# Oracle Knowledge iConnect for Siebel Contact Center Integration Guide

*Using iConnect to Integrate Siebel and Oracle Knowledge Applications*

Oracle Knowledge Version 8.4.2.2

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# Contents

# About This Guide

This guide provides detailed instructions and supporting information for installing and configuring Oracle Knowledge iConnect for Siebel Contact Center for use with an Oracle Knowledge application. This guide is intended for application developers and systems administrators who need to plan for and perform integration of iConnect for Siebel Contact Center with an Oracle Knowledge application and a supported Siebel CRM application.

This preface includes information on:

- “In This Guide” - The general organization of this guide.
- “Screen and Text Representations”
- “References to World Wide Web Resources”

## In This Guide

The Oracle Knowledge iConnect for Siebel Contact Center Integration Guide is divided into the following sections:

| | |
|---|---|
| *Chapter 1, Oracle Knowledge iConnect for Siebel Contact Center* | This chapter describes Oracle Knowledge iConnect for Siebel Contact Center installation, installed directories and files, product components, and the integration process. |
| *Chapter 2, Configuration Scenarios* | This chapter provides an overview of the different ways iConnect can be configured to interoperate with Siebel CRM applications. |
| *Chapter 3, Deploying iConnect in a Siebel Environment* | This chapter describes how to import and deploy the iConnect components into the Siebel environment using Siebel Tools. |
| *Chapter 4, Configuring Content Integration* | This chapter describes how to configure the iConnect components that make Oracle Knowledge application available to the Siebel application. |
| *Chapter 5, Configuring Data Integration* | This chapter describes how to configure the data transfer between the Oracle Knowledge application and the Siebel application. |
| *Chapter 6, Configuring the iConnect Integrated User Interface* | This chapter describes how to adjust the height of the search results frame within the Siebel application. |
| *Appendix A, Deploying Intelligent Search for Siebel* | This appendix discusses the Content Converter Style Sheet, the Runtime Event, and the Web Services. |
| *Appendix B, Configuring Oracle Knowledge Content Processing* | This appendix discusses the Siebel Content Acquisition and Presentation and provides information on configuring a Siebel crawler. |

## Screen and Text Representations

The product screens, screen text, and file contents depicted in the documentation are examples. We attempt to convey the product's appearance and functionality as accurately as possible; however, the actual product contents and displays may differ from the published examples.

## References to World Wide Web Resources

For your convenience, we refer to Uniform Resource Locators (URLs) for resources published on the World Wide Web when appropriate. We attempt to provide accurate information; however, these resources are controlled by their respective owners and are therefore subject to change at any time.

CHAPTER 1

# Oracle Knowledge iConnect for Siebel Contact Center

The Oracle Knowledge iConnect for Siebel Contact Center provides a complete intelligent search interface that enables contact center agents to quickly and easily find accurate answers to customer inquiries from within their Siebel dashboard.

iConnect for Siebel Contact Center leverages Oracle Knowledge's patented Intelligent Search technology to find exact answers to inquiries based on their meaning, and to search unstructured content, structured data sources and transactional business applications in parallel. The Oracle Knowledge technology can automatically incorporate customer context, call context, and CRM contextual information in the search for answers to customer inquiries.

iConnect for Siebel Contact Center user interface is embedded within the CRM desktop, designed to maximize agent productivity and minimize keystrokes, improving call resolution rates. The answers are more than just mere links to source content; they also include relevant excerpts that have a high probability of answering the inquiry based on their intent.

iConnect for Siebel Contact Center significantly streamlines the call wrap-up process by automatically providing embedded links to associate the right enterprise knowledge with each service request resolution task.

## Integration Requirements and Supported Applications

The following table lists the requirements and supported applications for the iConnect for Siebel Contact Center for Oracle Knowledge integration:

| Oracle Knowledge Requirements | Supported Siebel Products |
|---|---|
| The following Oracle Knowledge products are required:<br>• Complete and configured Oracle Knowledge 8.1.3, or higher, installation<br>• iConnect for Siebel Contact Center 8.1.3 | One of the following supported Siebel products:<br>• Siebel Call Center 7.8<br>• Siebel Call Center 8.0<br>• Siebel Call Center 8.1 |

Siebel integration with Oracle Knowledge requires a complete and configured Oracle Knowledge installation, as well as the installed and deployed iConnect for Siebel Contact Center software components.

You must access Siebel Tools to import the Siebel Import Files (.sif) containing the Oracle Knowledge-supplied Siebel components, including the Project and Workflow for content access integration, as well as integration Applets and associated Business Components used for application user interface integration.

See the *Oracle Knowledge Platform and Language Requirements* for complete information on supported platforms and databases. The document is available at:

`https://documentation.inquira.com.`

## Terminology

Throughout this guide, the following terms are used:

| Term | Description |
|---|---|
| Siebel Import File (SIF) | This refers specifically to the files imported into the Siebel application to activate an integration with another application and have the .sif file extension. |
| Siebel Repository File (SRF) | This refers specifically to the files used by the Siebel repository and have the .srf file extension. |
| integration files | This term refers collectively to all of the necessary files to implement the iConnect for Siebel application in the Siebel CRM environment. |

# iConnect for Siebel Contact Center Installation

To install the iConnect for Siebel Contact Center, access the Oracle Knowledge release download site. Under the **Platform: All** heading, click Siebel Files.

Download the following files for your platform and Siebel version:

| Platform | Siebel File |
|---|---|
| Windows | Siebel-7.8.zip |
| | Siebel-8.0.zip |
| | Siebel-8.1.zip |
| UNIX/LINUX | Siebel-7.8.tar.gz |
| | Siebel-8.0.tar.gz |
| | Siebel-8.1.tar.gz |

Open the Siebel-X.x.zip file and extract the contents to:

```
<InQuira_home>\archive\siebel
```

* You may need to create the `siebel` directory when extracting the files.

The iConnect for Siebel Contact Center file extraction creates the following directory structure in Windows:

```
\CCA
    \DataMaps
    \SIF
    \WebService
    \WebTemplate
    \Workflows[1]
    \Wsdl[1]
\CRAWLER
    \DataMaps
    \RunTimeEvents
    \SIF
    \WebService
    \Workflows[1]
    \Wsdl[1]
\xsl
```

1. Workflows supporting the iConnect for Siebel Contact Center for Siebel versions 8.0 and 8.1 are included as part of SIF files and are imported into Siebel Tools during the SIF import process. Therefore, the iConnect for Siebel contact center file extraction does not create separate directories for workflow processes. The separate workflow directories as mentioned in the directory structure above will be created with iConnect for Siebel Contact Center for Siebel version 7.8 only.

# iConnect for Siebel Contact Center Installation Directories

The following tables describe the installation directories and files for iConnect for Siebel Contact Center.

The `Siebel` directory contains the following sub-directories and files:

| Directory | Description |
|---|---|
| **CCA** | This directory contains the iConnect for Siebel Contact Center components. |
| **CRAWLER** | This directory contains the iConnect for Siebel Contact Center components. See Appendix B, “Configuring Oracle Knowledge Content Processing.” for more information on the Siebel crawler. |
| **xsl** | This directory contains the standard content converter stylesheets which you copy to the Oracle Knowledge application and the web server.<br>`main.xsl`<br>`sr_transformation.xsl` |

The `CCA` directory contains the following iConnect for Siebel Contact Center directories and files:

| Directory | Description |
|---|---|
| **DataMaps** | This directory contains two files which are used in the data integration process.<br>`InQuiraLinkUnlinkSRDM.XML`<br>`InQuiraSRLinkedAnswersDM.XML` |
| **SIF** | This directory contains the Siebel Import File for the iConnect for Siebel Contact Center.<br>`InQuiraProject.sif`<br>You import this file into the Siebel environment during the deployment process. |
| **WebService** | This directory contains the webservices file:<br>`InQuiraSRLinkedAnswers.XML` |
| **WebTemplate** | This directory contains the Oracle Knowledge search applet, `InquiraSearchApplet.swt`, for deployment in the Siebel environment. |
| **Workflows** | The directory contains the workflows which must be imported into Siebel 7.8:<br>`InQuiraGetSRLinkedAnswers`<br>`InQuiraLinkUnlinkAdapter`<br>**Note:** This directory appears only in the `siebel-7.8.zip` or `siebel-7.8.tar.gz` files. |
| **Wsdl** | This directory contains the WSDL (Web Services Description Language) files which must be imported into Siebel 7.8 to link answers.<br>`InQuiraSR_Linked_Answers.WSDL`<br>`InQuiraSRLinkedAnswers_InQuira SR Linked Answers.WSDL.xml`<br>**Note:** This directory appears only in the `siebel-7.8.zip` or `siebel-7.8.tar.gz` files. |

The CRAWLER directory contains the following iConnect for Siebel Contact Center files:

| File | Description |
|---|---|
| **DataMaps** | This directory contains the datamap file:<br>`InQuiraSRDetails.XML` |
| **RunTimeEvents** | This directory contains the runtime event file:<br>`RTE.xml` |
| **SIF** | This directory contains the Siebel Integration File, which is imported into the Siebel environment during the deployment process:<br>`InQuiraCrawlerProject.sif` |
| **WebService** | This directory contains the webservices file:<br>`InQuiraCrawler.XML` |
| **Workflow** | This directory contains the packaged workflow processes that you deploy within the Siebel environment that locate the Integration Objects and write the associated data to XML files for access by the configured Oracle Knowledge Siebel crawlers.<br><br>The following workflow processes are for Siebel 7.8:<br>`InQuiraCleanUpTransCrawlRecord`<br>`InQuiraCrawlerFullGet`<br>`InQuiraCrawlerGetSRDetails`<br>`InQuiraCrawlerPartialGe`<br>`InQuiraInsertTransCrawlRecord`<br>`InQuiraMainTransCrawlRecord`<br>**Note:** This directory appears only in the `siebel-7.8.zip` or `siebel-7.8.tar.gz` files. |
| **Wsdl** | This directory contains the WSDL (Web Services Description Language) files that must be imported into Siebel 7.8 to use the crawler.<br>`SiebelInQuira_Crawler.WSDL`<br>`SiebelInQuira_InQuiraCrawler.WSDL.xml`<br>**Note:** This directory appears only in the `siebel-7.8.zip` or `siebel-7.8.tar.gz` files. |

# iConnect for Siebel Contact Center Components

iConnect for Siebel Contact Center consists of the following components that you deploy within the Siebel CRM environment:

- Custom Siebel Projects packaged as Siebel Import Files (.sif) that you import and deploy as described in *Chapter 3, Deploying iConnect in a Siebel Environment*
- Custom user interface templates (`InquiraSearchApplet.swt`) as described in “Deploying the Oracle Knowledge Search Applet Template” on page 20

# The Integration Process

iConnect for Siebel Contact Center integration requires a complete and configured Oracle Knowledge installation, as well as a supported Siebel CRM application installation.

You need access to Siebel Tools to import the Siebel Import files (.sif) containing the Oracle Knowledge-supplied Siebel components.

The iConnect for Siebel Contact Center deployment process consists of the following steps:

- Deploy the iConnect for Siebel Contact Center components in the Siebel environment as described in *Chapter 3, Deploying iConnect in a Siebel Environment*
- Configure content integration as described in *Chapter 4, Configuring Content Integration*
- Configure data integration as described in *Chapter 5, Configuring Data Integration*
- Edit the Siebel user interface as described in *Chapter 6, Configuring the iConnect Integrated User Interface*

CHAPTER 2

# Configuration Scenarios

This chapter describes the configuration options to integrate Siebel and Oracle Knowledge iConnect for each of the following scenarios:

- **Search in Context**
- **Single Sign-on**
- **Localizing Oracle Knowledge and Multi-Lingual Content**
- **Linking a Document to a Case**
- **Unlinking a Document**
- **Creating New Content and Providing Feedback**
- **Supporting Multiple CRM Systems**

The function provided for individual documents from Information Manager are available when viewing search results from the web pages. These functions include document editing, recommending changes to documents, viewing change recommendations, rating, subscribing, and other useful functions for users.

## Search in Context

Search in context is the ability to allow a user to find an answer based upon the content of the case that they are currently working. With the click of a button, information is pulled from the case and presented to Oracle Knowledge to identify the best answer. The user can then interact with Oracle Knowledge to further refine their search, click to view content, provide feedback, or perform one of other many functions provided through the Oracle Knowledge UI.

### Siebel Implementation

Configure the Symbolic URL to point to the Oracle Knowledge instance.

Configure Single Sign-on for Siebel (either through Siebel SSO mapping or some other third party SSO solution).

Configure application views.

Configure data integration.

### iConnect Application Configuration

Configure to point to Oracle Knowledge search runtime.

# Single Sign-on

Oracle Knowledge accepts the user credentials (user id and password) that are passed and automatically logon the user when the user initiates the first search request for a case. If the user is unknown, then the user appears as an anonymous user. If the user is known, the user is automatically logged into Oracle Knowledge.

The user is mapped to a user Role, which dictates the privileges for that user that are displayed within the Oracle Knowledge application.

This password encryption/decryption only affects the autologin for system integration. It does not affect the normal login process, being native Oracle Knowledge implementation, LDAP, or any custom made implementation through IAuthenticate.

Using HTTPS communication between Siebel and InfoCenter/iConnect further improves the security for sensitive data.

If using Single Sign-on products, such as Site Minder, a customized SSO can replace the AUTOLOGIN delivered.

## Siebel Implementation

Define Oracle Knowledge User Name and Password in Siebel SSO configuration. The password should be encrypted (entered in encrypted format). The default password is encrypted as it is in Information Manager when a user/password is created.

## iConnect Application Configuration

Configure the encryption algorithm for entry CRYTO_CLASS_NAME in config.properties for each iConnect application. This can be done though IM console, System Config Expert mode. By default, it is preconfigured as com.inquira.foundation.utilities.CVEncryption.

The encryption algorithm can be custom implemented and plugin to the iConnect system as long as it implements the following interface.

```
package com.inquira.foundation.utilities;
public interface ICVCrypto {

   public String encryptPassword(String str)throws CVSecurityException ;
   public String decryptPassword(String str)throws CVSecurityException ;
}
```

The encryption algorithm should apply on both Siebel and on iConnect.

# Localizing Oracle Knowledge and Multi-Lingual Content

The Oracle Knowledge iConnect Application accepts the user locale to dynamically determine the localized version of iConnect to display for the user. The locale for the user is also used to determine the locale of the answers returned. In addition, the user can select additional languages for which they would like to see results returned. Oracle Knowledge provides cross-lingual search where results may be returned in all languages, while the user enters the question in the native language. Automatic spell checking occurs for their native language and concepts are identified that may match other languages and in-turn match on other content for those languages.

For example, when entering "funcionnes" in Spanish, Information Manager uses spell check to correct this as "funciones" and matches on the concept "features" in English. Often all content is not translated into all languages. Cross-lingual search allows users who can read multiple languages, but have trouble writing in another, to enter a question in the native language and see results in other languages that they can read.

## Siebel Implementation

Locale is passed for the user in the Symbolic URL (param "locale") or embedded in iConnect customized implementation.

## iConnect Application Configuration

Multiple Languages can be configured within Oracle Knowledge to provide a checkbox to the end user for the language of results.

# Linking a Document to a Case

Oracle Knowledge iConnect provides the feature to link an answer to a case. When a user finds a solution, the user can link that solution to the case and Information Manager records the following details:

- URL
- Document ID
- User Name*
- Excerpt
- Solution ID
- Linked Date
- Title
- Version
- Oracle Knowledge Status

*This is the user who linked the solution.

For the case, this is an audit trail of what was used as a solution for the case. Within Oracle Knowledge, the activity of linking a document to a case results in the document reuse count and document value being incremented, identifying the author for the usefulness or value of the contribution in reports and in the author's reputation.

An optional parameter, incident value for the case, can be applied to influence the document value by passing in a value for the case when the document is linked (e.g. Severity 1 passes in 10, while Severity 4 passes in 1). The document value is the sum of all incident values for the cases to which the document was linked.

Using an incident value allows the recognition of users who author documents that are reused to solve critical cases. It also influences the user's reputation points. Often the best support people work on the fewest, but most critical cases, and write the fewest documents, but they are valuable documents to the company. Incident value helps to recognize these individuals for their contributions.

**Important!** A closed case cannot link any additional answers.

## Siebel Implementation

Configure web services.

## Oracle Knowledge Search Configuration

Create a **Linked Answers** tab, as described in “Configuring Service Request Screen” on page 46.

# Unlinking a Document

Oracle Knowledge iConnect provides the feature to unlink an answer from a case. When a user determines that the answer linked to the case did not resolve the case, the user can unlink the answer from the case. This process will also decrement the reuse count and the document value for the document that is unlinked.

## Siebel Implementation

Configure web services.

## Oracle Knowledge Search Configuration

The linking configuration described above also creates the ability to unlink.

# Creating New Content and Providing Feedback

If the issue is not known, the user can create a document which frames the problem and the resolution to the issue. The information from the case can be used to create a new document. The draft document can be automatically linked to the case as what was used to resolve the case, and the document will be available for other users to view and possibly publish to the web site for external users.

A knowledge management platform is a content manufacturing engine as users create content to resolve new issues, systematically filling content gaps and publishing new, relevant content to the web site.

If granted the privileges to do, users may edit existing content as they use it in the case that they find a problem with a document that needs to be fixed.

Users may also recommend new content if they are not provided the privilege to create new content directly. Users may recommend changes to an existing document and see recommended changes from other users when viewing a document.

Users may provide other feedback specifically for their search experience to flag sessions that are problematic for offline analysis, as well as provided ratings and feedback on content.

Users may also post topics for discussion using Oracle Knowledge forums, from which new documents can be sourced.

## Siebel Implementation

Uses the Link Web Service defined for linking a document to a case.

Uses the Symbolic URL to pass information about the case and prefill draft documents or recommendations.

# Supporting Multiple CRM Systems

A single instance of Oracle Knowledge can be used for multiple CRM systems. Different groups within a company may use different CRM systems, but still need to find and share answers. Each CRM system can be configured and passed to iConnect for iConnect to know which CRM system is linking answers to their cases. iConnect would then invoke the corresponding set of link or unlink web services.

## Siebel Implementation

The Symbolic URL passes a system parameter ("cca_system" value has to match the Call Center Advisor name of Call Center Advisor config in Advanced config).

## Oracle Knowledge iConnect Configuration (Search instances)

The iConnect is configured in System Manager, see Chapter 4, “Configuring Content Integration”. The CC Advisor name must match the "cca_system" value in Symbolic URL defined in Siebel. A different CC Advisor with a unique name can be created for each CRM system.

CHAPTER 3

# Deploying iConnect in a Siebel Environment

iConnect for Siebel Contact Center contains various integration files that you import into the Siebel repository and configure within the Siebel environment. You use the Siebel Tools application to import the following integration files:

| Integration File | Location |
|---|---|
| InQuiraProject.sif | <InQuira_home>\archive\siebel\CCA\SIF |
| InQuiraLinkUnlinkSRDM.xml | <InQuira_home>\archive\siebel\CCA\Datamaps |
| InQuiraSRLinkedAnswersDM.xml | <InQuira_home>\archive\siebel\CCA\Datamaps |
| InQuiraSearchApplet.swt | <InQuira_home>\archive\siebel\CCA\WebTemplate |
| InQuiraSRLinkedAnswers.xml | <InQuira_home>\archive\siebel\CCA\WebService |
| InQuiraGetSRLinkedAnswers | <InQuira_home>\archive\siebel\CCA\Workflows |
| InQuiraLinkUnlinkAdapter | <InQuira_home>\archive\siebel\CCA\Workflows |

**Note:** To deploy in Siebel 7.8, you must first import the following workflows:

- InQuiraCleanUpTransCrawlRecord
- InQuiraCrawlerFullGet
- InQuiraCrawlerGetSRDetails
- InQuiraCrawlerPartialGe
- InQuiraInsertTransCrawlRecord
- InQuiraMainTransCrawlRecord

To import the iConnect for Siebel Contact Center integration files:

- Ensure that your environment is prepared for the import process as described in “Preparing for the Import Process” on page 14.
- Log onto the Siebel Tools application as described in “Accessing the Siebel Tools Application” on page 14.
- Set the repository into which you want to install the Siebel Repository Configuration as the current repository.
- Select a project to import the iConnect for Siebel Contact Center SIF files into, as described in “Selecting the Project for the Import Process” on page 15.
- Import the integration files as described in “Importing iConnect for Siebel Contact Center Integration Files” on page 15 and “Importing the Crawler Integration Files” on page 20.

**Important!** This chapter describes the import process using the integration file Oracle Knowledge Project as an example. You must repeat the import process for each integration file.

Once you have imported the iConnect for Siebel Contact Center SIF files into the selected project, you complete the deployment process by:

- Deploying the Oracle Knowledge Search Applet template as described in “Deploying the Oracle Knowledge Search Applet Template” on page 20.
- Activate the table in Siebel as described in “Activating the Table in Siebel” on page 21.
- Compiling the Siebel repository as described in “Compiling the Siebel Repository” on page 22.
- Deploying the updated repository as described in “Deploying the Updated Repository in the Siebel Environment” on page 31.

# Preparing for the Import Process

To prepare for the import process, ensure that the following prerequisites are met in your environment:

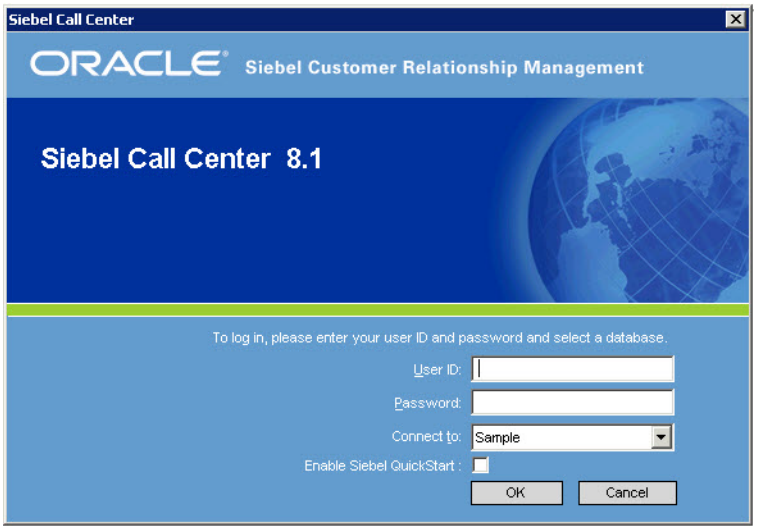
- There are no existing projects having the names of the SIF files that you will import in this process.
- The appropriate Siebel repository is set as the current repository.

**Important!** If a project of the same name as one of the iConnect for Siebel Contact Center integration files currently exists, you must lock it to ensure that the import process can resolve any object definition conflicts.

# Accessing the Siebel Tools Application

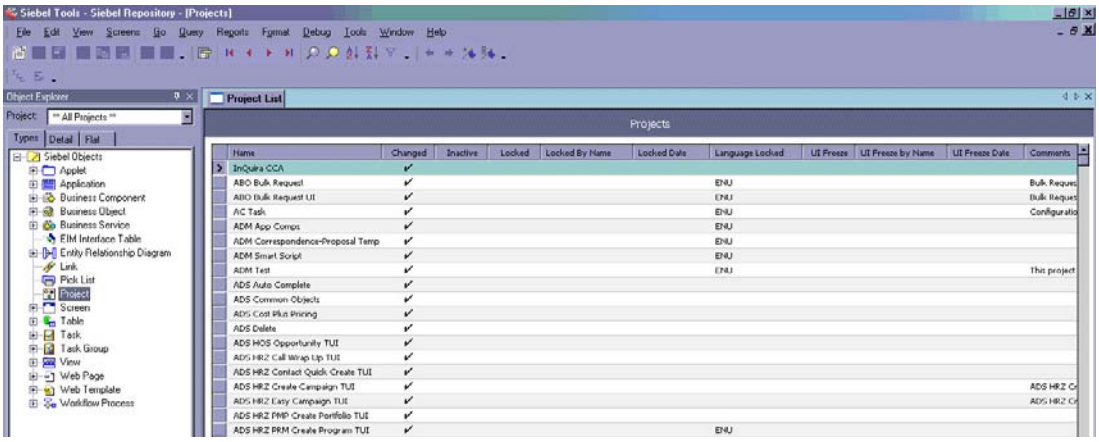
To access the Siebel Tools application, log onto the Siebel Tools application as a user with administrator privileges, and specify the server connection, as in the following example:

| Login Parameter | Value |
|---|---|
| **User ID:** | `<siebel_admin_ID>` |
| **Password:** | `<siebel_password>` |
| **Connect:** | Server |



# Selecting the Project for the Import Process

The import process prompts you to specify the project into which you will import the iConnect integration files. You can import the integration files into an existing project, or create a new project. In the examples that follow, we use an example project named `InQuira CCA`.




# Importing iConnect for Siebel Contact Center Integration Files

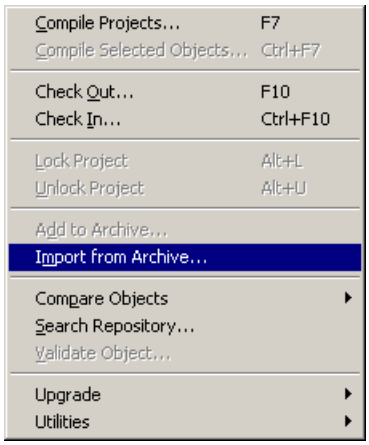
This section describes how to import iConnect Siebel integration files into the Siebel environment and discusses:

- **Specifying the Conflict Resolution Method for the Import Process**
- **Reviewing Conflicts**
- **Confirming the Import**
- **Viewing the Import Summary**

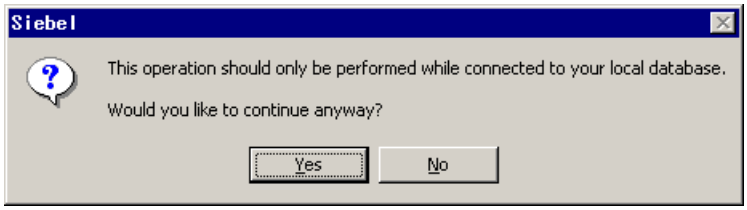
You import the iConnect for Siebel Contact Center integration (.sif) files into the Siebel environment using the Siebel Tools application.

To import the Oracle Knowledge project:

1 In the Siebel Tools application, select **Import from Archive** from the **Tools** menu:

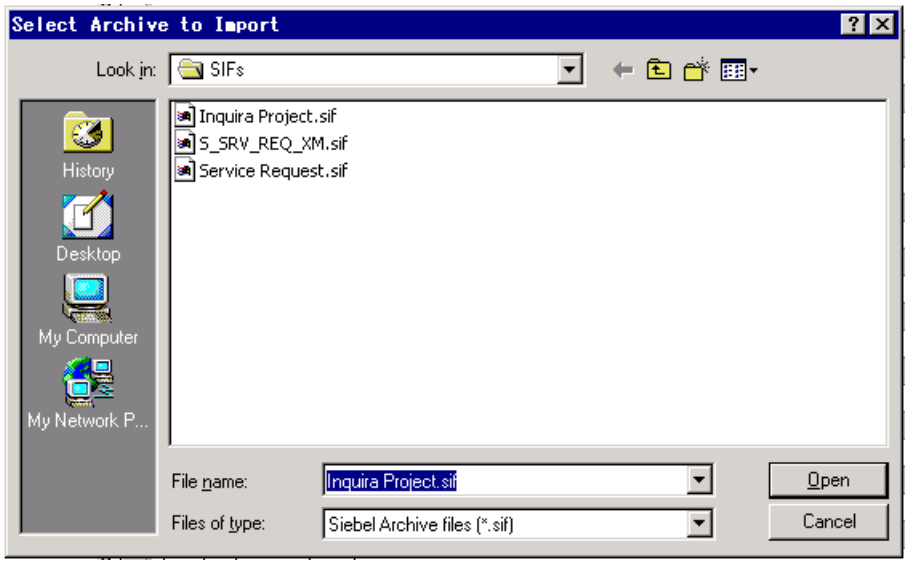


You may see the following message:




2 Select **Yes** to continue.

Siebel Tools displays the **Select Archive to Import** dialog:




3 In the file browser, navigate to the following directory:

`<InQuira_home>\archive\siebel\CCA\SIF`

4 Select the first integration file in the list, **InQuiraProject.sif**.

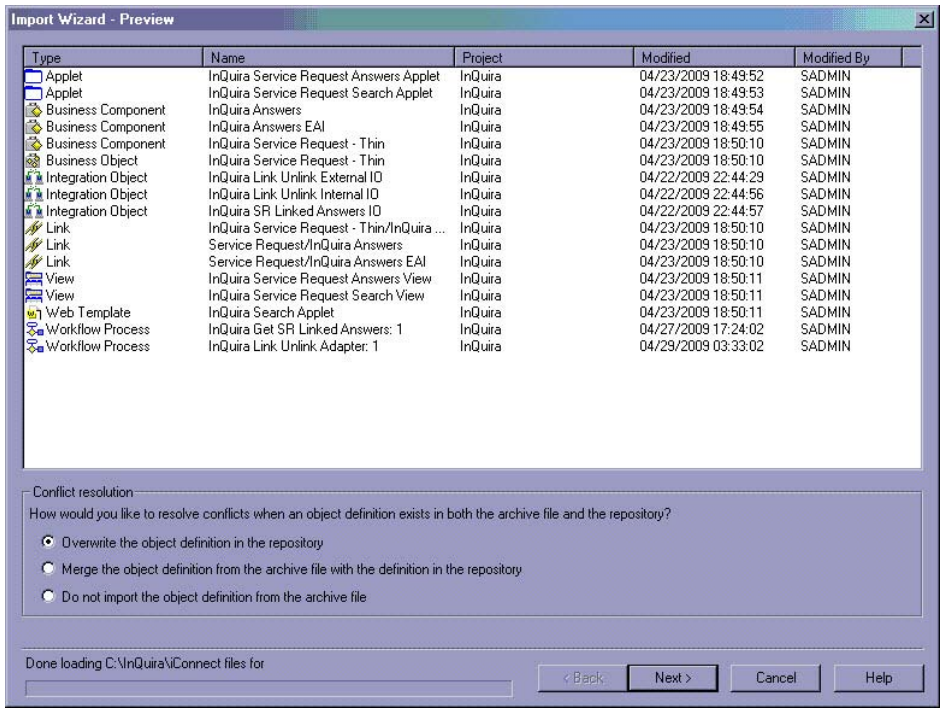
5 Click **Open**.

Siebel Tools displays the Import Wizard.

## Specifying the Conflict Resolution Method for the Import Process

The Siebel Tools Import Wizard displays a preview screen that:

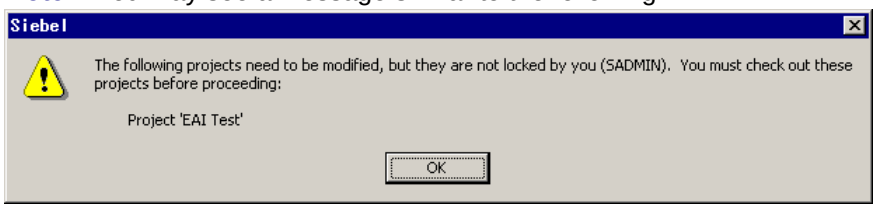
- Lists the objects in the selected archive
- Prompts you to specify conflict resolution method for any objects that currently exist in the repository




To specify the Conflict Resolution Method:

1. Select **Overwrite the object definition in the repository**.
2. Select **Next >** to continue.

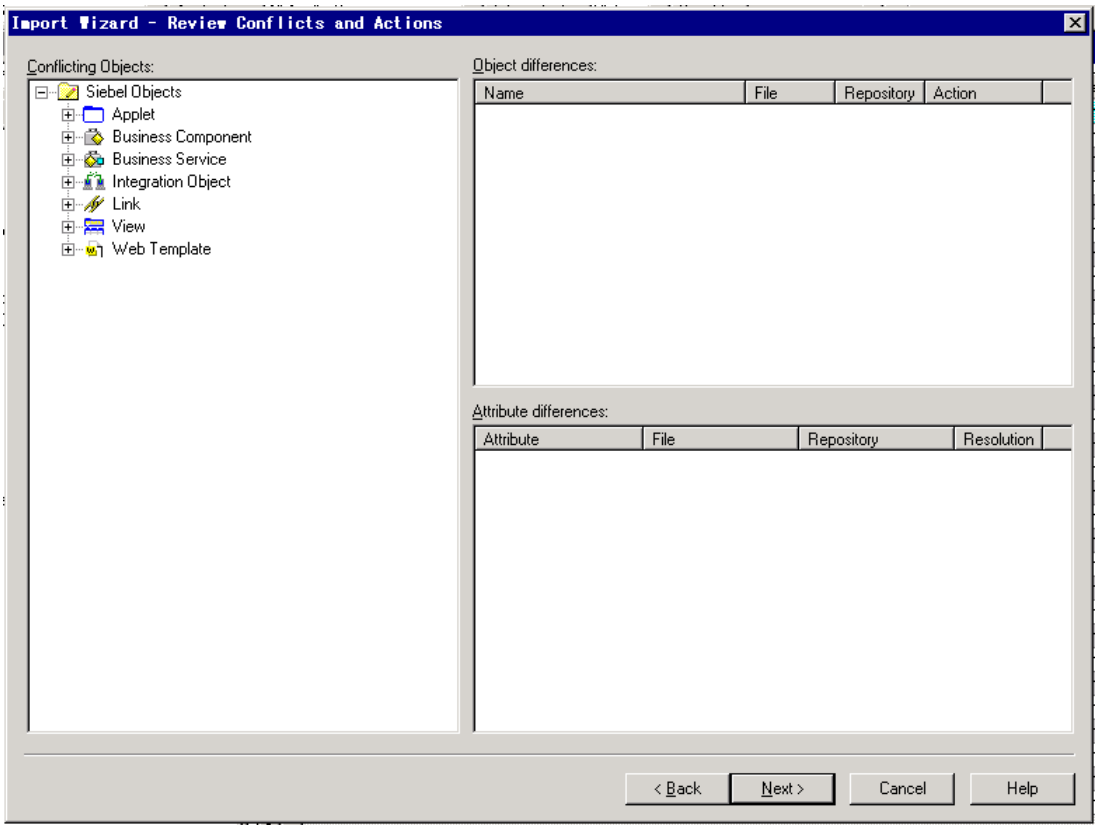
**Note:** You may see a message similar to the following:




3. Lock any projects listed, and continue the import process.

# Reviewing Conflicts

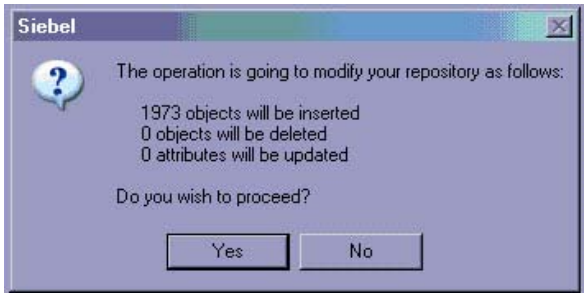
The Import Wizard lists any object definition conflicts between the project to be imported and an existing project of the same name if it exists.




Select **Next >** to continue.

# Confirming the Import

The Import Wizard displays a summary message that details the updates to the repository that will occur in the import process.

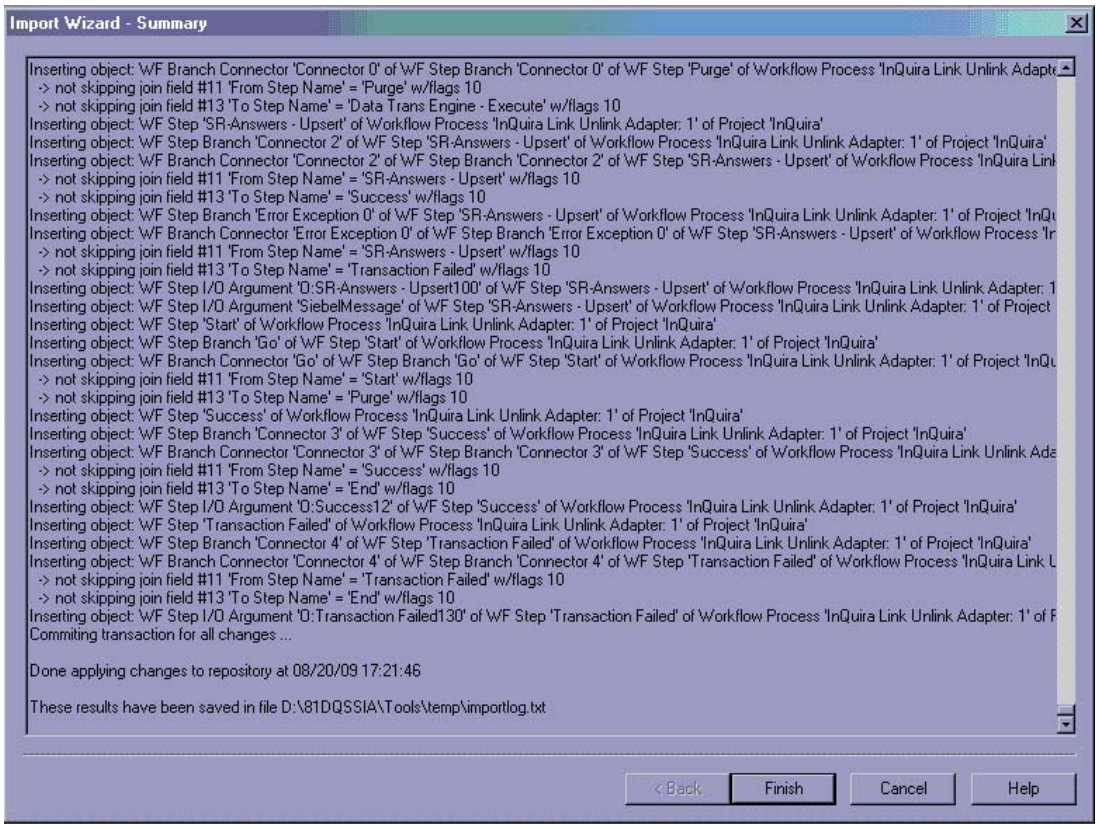



Select **Yes** to continue. The Import Wizard displays the Summary screen.

**Note:** The figure above is an example. Repository modification results vary depending on the iConnect version and configuration specifics of a given installation.

## Viewing the Import Summary

The Summary screen displays messages that detail the import process, concluding with a completion message.

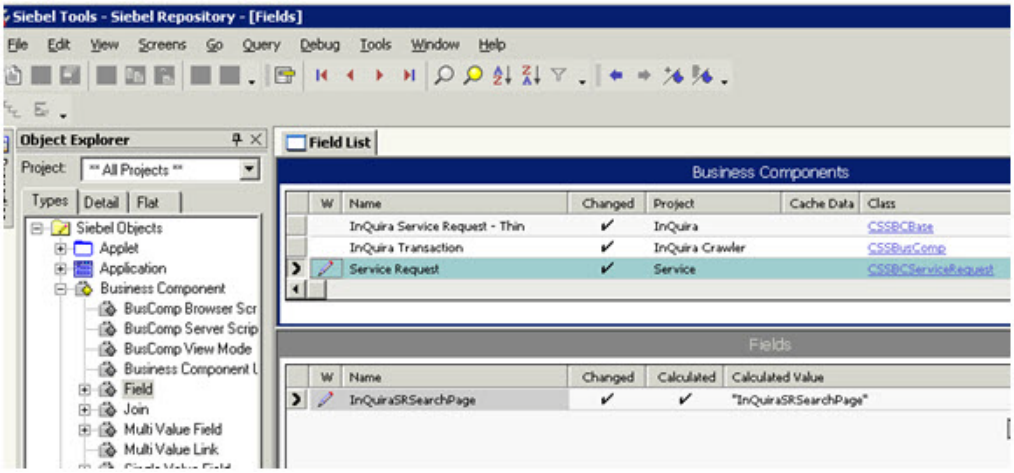



Select **Finish**, and verify the import process results.

**Note:** If the import fails for some reason, please take a screen capture of the error and escalate the issue to Oracle Knowledge.

# Modifying the Business Component (Service Request)

The Service Request business component (BC) within Siebel Tools must be modified to include the following calculated fields with the properties set as below.




To create 'InQuiraSRSearchPage' field within Service Request BC:

1. Log into Siebel Tools and select 'Business Component' within Object Explorer
2. Query for 'Service Request' business component. Lock the object by right clicking on Service Request BC and selecting 'Lock Object' from the pop-up menu, if the Service Request BC is not locked.
3. Select 'Field' object to display the list of fields.
4. Create a new field by right clicking in the fields list and selecting 'New' from the pop-up menu.
5. Set following properties for the field:

| Property | Value |
|---|---|
| Name | InQuiraSRSearchPage |
| Calculated | Yes (select the check box) |
| Calculated Value | "InQuiraSRSearchPage" |
| Type | DTYPE_TEXT |

# Importing the Crawler Integration Files

Repeat the process described in “Importing iConnect for Siebel Contact Center Integration Files” on page 15 to import the InQuiraCrawlerProject.sif file, stored in the following location:

```
<InQuira_home>\archive\siebel\CRAWLER\SIF
```

# Deploying the Oracle Knowledge Search Applet Template

You deploy the iConnect for Siebel Contact Center search applet template by copying it from the installation location into the Siebel instance web template folder.

To deploy the applet template, copy the file `InquiraSearchApplet.swt,` from:

```
<InQuira_home>\archive\siebel\CCA\WebTemplate
```

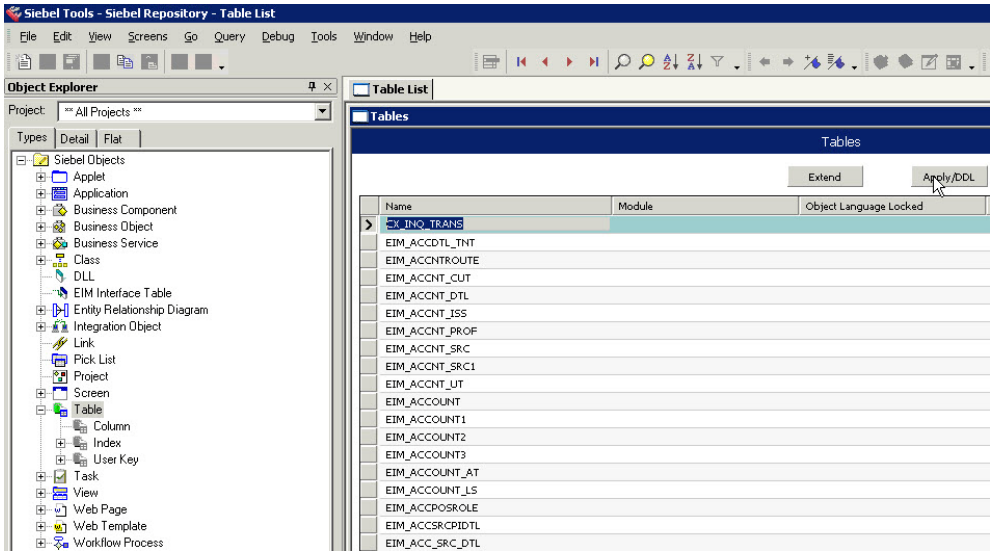
to

```
<Siebel_home>\siebsrvr\WEBTEMPL
```

# Activating the Table in Siebel

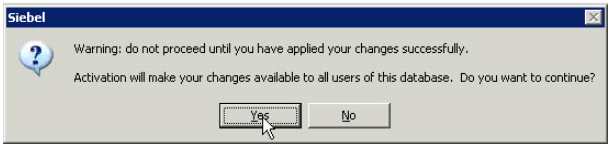
To activate the table in Siebel:

1. Access Siebel Tools - Siebel Repository - Table List
2. Select the CX_INQ_TRANS table from the list.

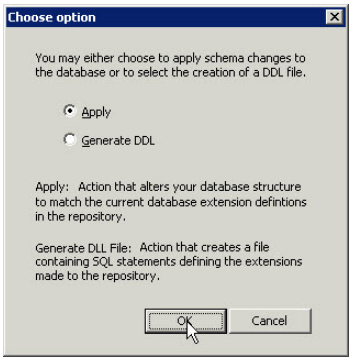



3. Click **Apply/DDL**.

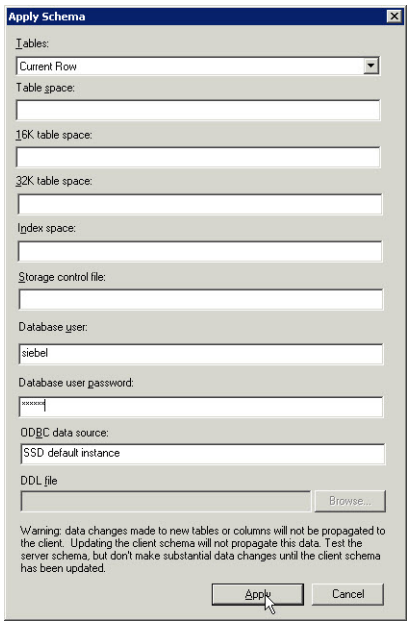
If you receive a warning like the one below, click **Yes**.




4. In the Choose Option dialog box, select **Apply** and click **OK**.



The Apply Schema window displays.




5 Enter the Database user and Database user password in Apply Schema.

6 Click **Apply**.

Siebel Tools applies the table and provides a *Changes successfully applied* notification when complete.


7 Click **OK** in the Siebel notification.

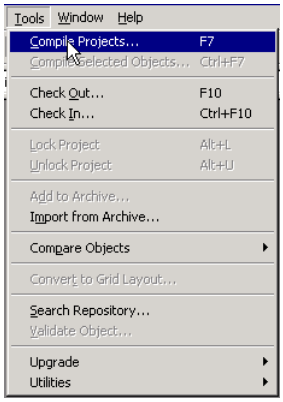
# Compiling the Siebel Repository

You must compile the Siebel Repository File (SRF or file extension .srf) to make the configuration available to the Siebel client application. We suggest that you select the option to compile all projects.

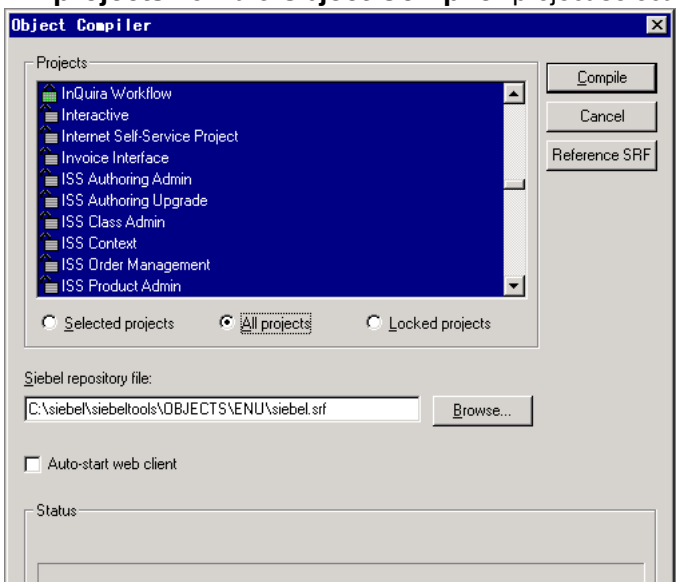
**Important!** Stop the Siebel server and the Siebel gateway services prior to compiling the repository.

To compile the Siebel repository:

1 Select **Compile Projects** from the **Tools** menu.




2 Select **All projects** from the **Object Compiler** project selection screen




3 Select **Compile**.

**Note:** Compile time varies depending on the size of the repository and server characteristics. Compile may take between 5-30 minutes. After the compile is complete, you must copy the compiled SRF file to the appropriate location on the Siebel Server, as described in step 4, below.

**Important!** If compile errors out, please note the error, abort the configuration process, and escalate the issue to a Siebel admin/Oracle Knowledge Consultant.

4 After a successful compile, copy the compiled SRF to both the server and the client application.

**a** Unlock the locked project on the server.

**b** Copy the `siebel.srf` file to the following location on the Siebel server:

```
<SIEBEL_HOME>\siebsrvr\objects\enu
```

Use the following location for the client:

```
<SIEBEL_HOME>\client\objects\enu
```

It is recommended that you rename the current `siebel.srf` in the `<SIEBEL_HOME>/siebsrvr/objects/enu` directory to `siebel.srf.old<date&time>`.

**Important!** For **Siebel Industry Applications**, you must also replace the `siebel_sia.srf` file in the same directory, with the compiled `siebel.srf` file. In this case, you will have two files with the same compiled SRF content but with different names. It is recommended that you rename the current `siebel_sia.srf` to `siebel_sia.srf.old<date&time>`.

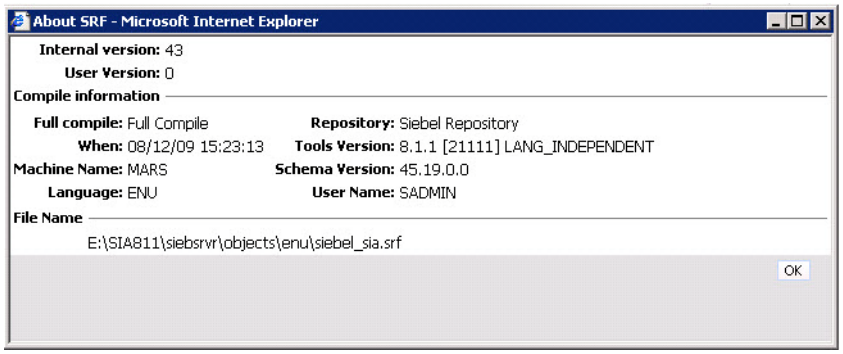
## Ascertaining Siebel Applications Type

You can ascertain the Siebel application type by either of the following methods:

Finding from the Siebel Application:

1. In the Siebel application, click on Help in the Menu bar.
2. Select **About SRF…** from the dropdown menu.

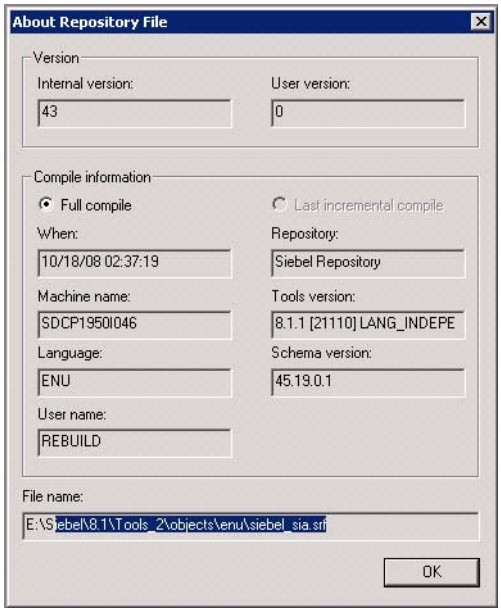
   A pop-up window appears as shown below. Note the file name in the pop-up window. If the file name is `siebel_sia.srf`, then the application is a Siebel Industry Application and you must copy the compiled SRF over `siebel_sia.srf` as well.




Finding from the Siebel Tools Application:

1. In the Siebel Tools application, click on Help in the Menu bar.
2. Select **About SRF…** from the dropdown menu.

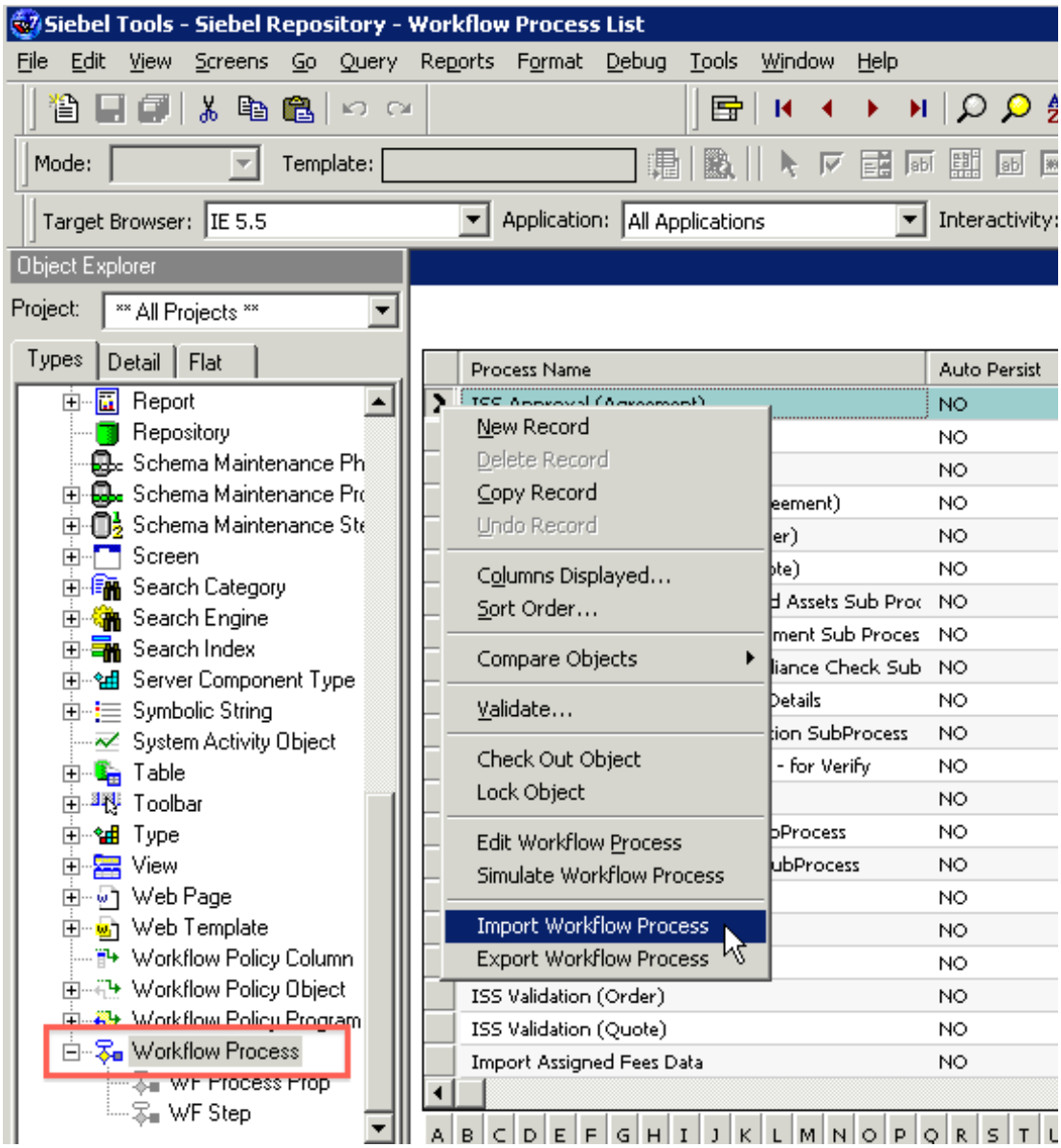
   A pop-up window appears as shown below. Note the file name in the pop-up window. If the file name is `siebel_sia.srf`, then the application is Siebel Industry Application and you need to copy the compiled SRF over `siebel_sia.srf` as well.



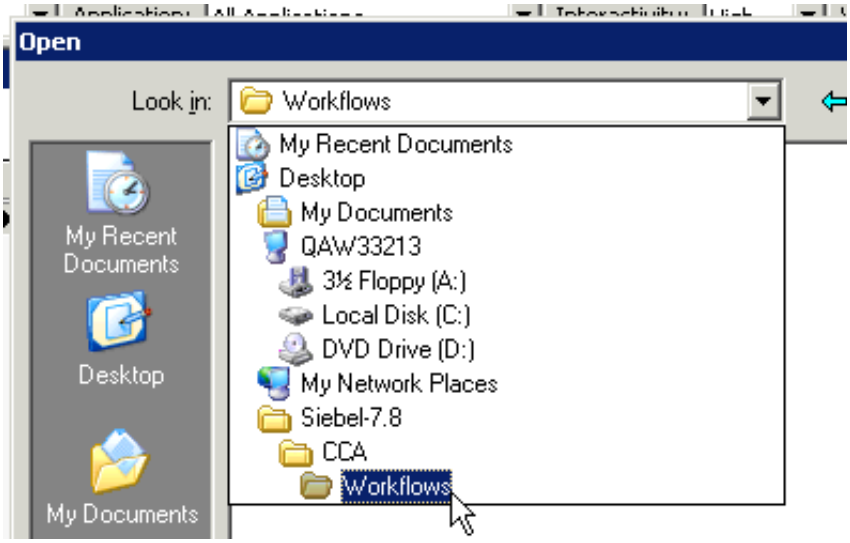

# Importing workflows in the Siebel Environment

**Important!** This section applies only to customers who are integrating Oracle Knowledge iConnect for Siebel 7.8 Contact Center. If you are integrating Oracle Knowledge iConnect for either Siebel version 8.0 or Siebel version 8.1, please go to the next section titled “Deploying and activating workflows in Siebel Environment”.

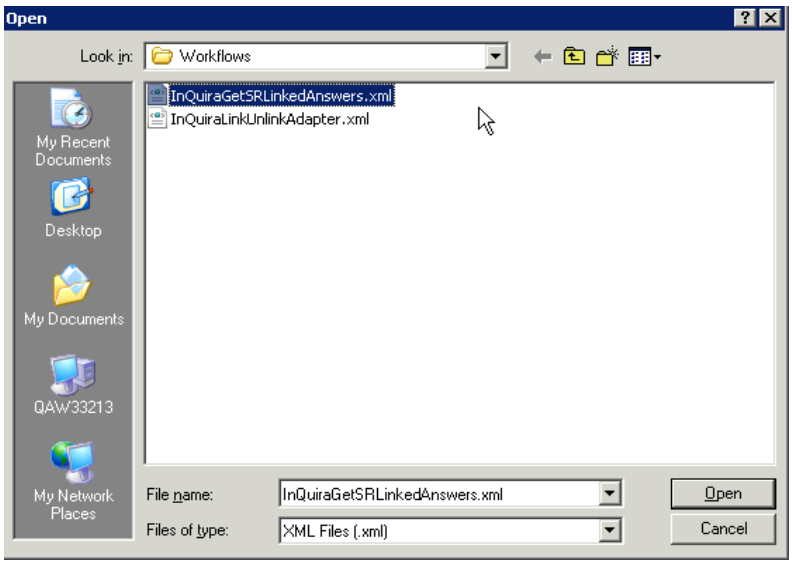
1. Select **Workflow Process** in the object explorer within Siebel Tools.
2. In the object list editor where all workflow processes are listed, right-click and select **Import Workflow Process**.


Siebel Tools - Siebel Repository - Workflow Process List
File Edit View Screens Go Query Reports Format Debug Tools Window Help
Mode: Template:
Target Browser: IE 5.5 Application: All Applications Interactivity:
Object Explorer
Project: ** All Projects **
Types Detail Flat
Report
Repository
Schema Maintenance Ph
Schema Maintenance Pr
Schema Maintenance St
Screen
Search Category
Search Engine
Search Index
Server Component Type
Symbolic String
System Activity Object
Table
Toolbar
Type
View
Web Page
Web Template
Workflow Policy Column
Workflow Policy Object
Workflow Policy Program
Workflow Process
WF Process Prop
WF Step
Process Name
Auto Persist
New Record
Delete Record
Copy Record
Undo Record
Columns Displayed...
Sort Order...
Compare Objects
Validate...
Check Out Object
Lock Object
Edit Workflow Process
Simulate Workflow Process
Import Workflow Process
Export Workflow Process
ISS Validation (Order) NO
ISS Validation (Quote) NO
Import Assigned Fees Data NO

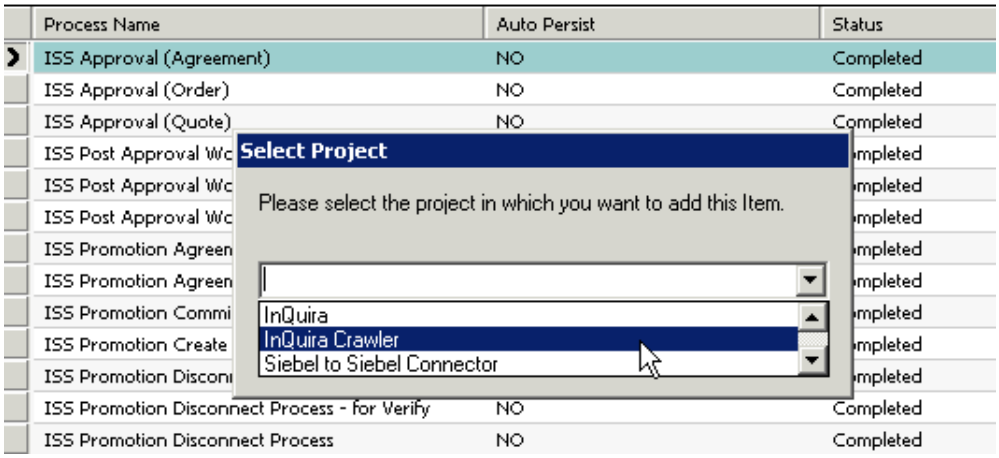
3 Navigate to the directory where you have extracted the iConnect files.




4 Navigate to the **Workflow** directory under the **CCA** folder. Select the workflow process for import from the **Workflow** directory and click **OK**.

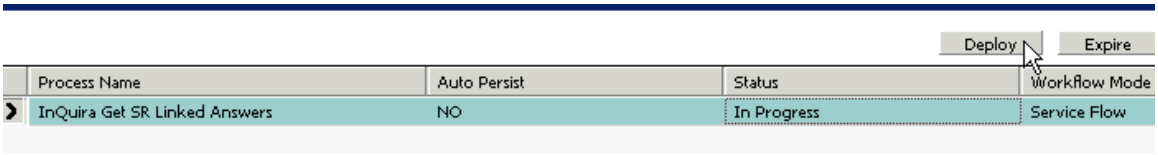



5 Select a project to import the workflow into when prompted next and click **OK** to import the workflow process.




6 Confirm that the workflow process selected has been imported into Siebel Tools by querying for it by its name.

7 Confirm that the status of newly imported workflow is 'In Progress'.




8 Repeat steps 1 through 7 to import the rest of workflows from **Workflow** directory under the CCA folder.

9 Import the workflows provided in the Workflow directory under the **Crawler** folder by following steps 1 through 7.

**Important!** Import the following workflows first while importing workflows provided under Crawler directory:

- InQuira Insert Trans Crawl Record
- InQuira CleanUp Trans Crawl Record

These workflows are referred as 'sub-processes', and hence should be imported before importing the other workflows to maintain the reference.

# Deploying Workflows in the Siebel Environment

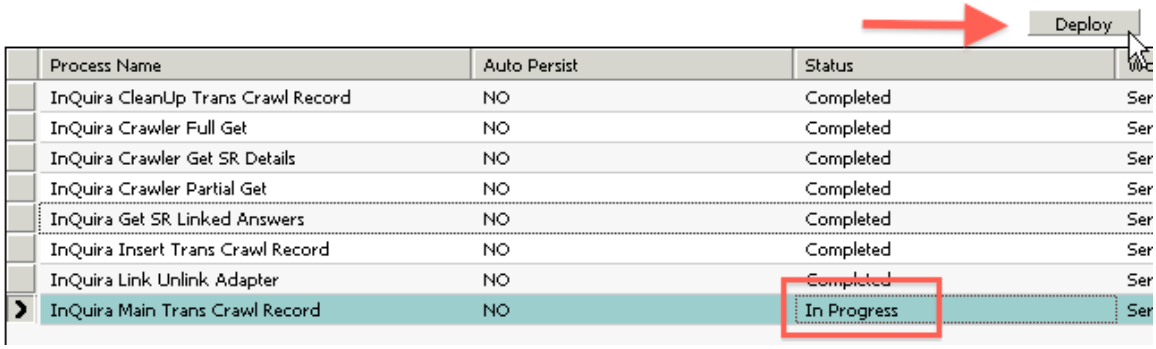
This section applies to Siebel versions 7.8, 8.0, and 8.1 customers integrating Oracle Knowledge iConnect for Siebel Contact Center applications.

After importing the workflows, check that the workflow status for all is 'In Progress'.

1 Select a workflow in object list editor in Siebel Tools and click **Deploy**.

2 Notice the status of the workflow changed to *Completed*.

3 Repeat step 1 to deploy all imported workflows.



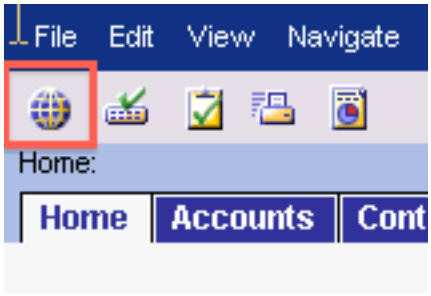

# Activating Workflows in the Siebel Environment

This section applies to Siebel version 7.8, 8.0, as well as 8.1 customers integrating Oracle Knowledge iConnect for Siebel Contact Center applications.

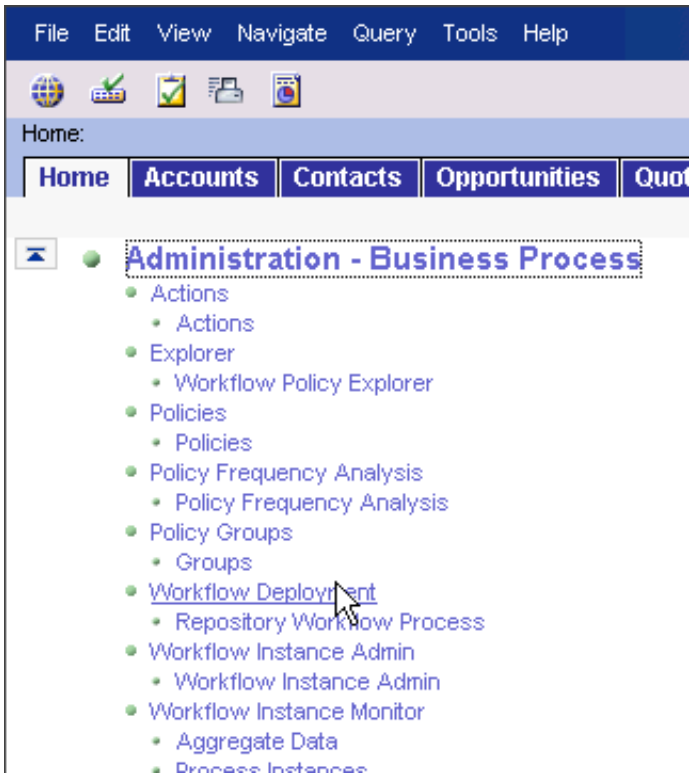
**Note:** Make certain that the Siebel server and Siebel gateway services have been restarted before logging into the Siebel application.

To activate the deployed workflows:

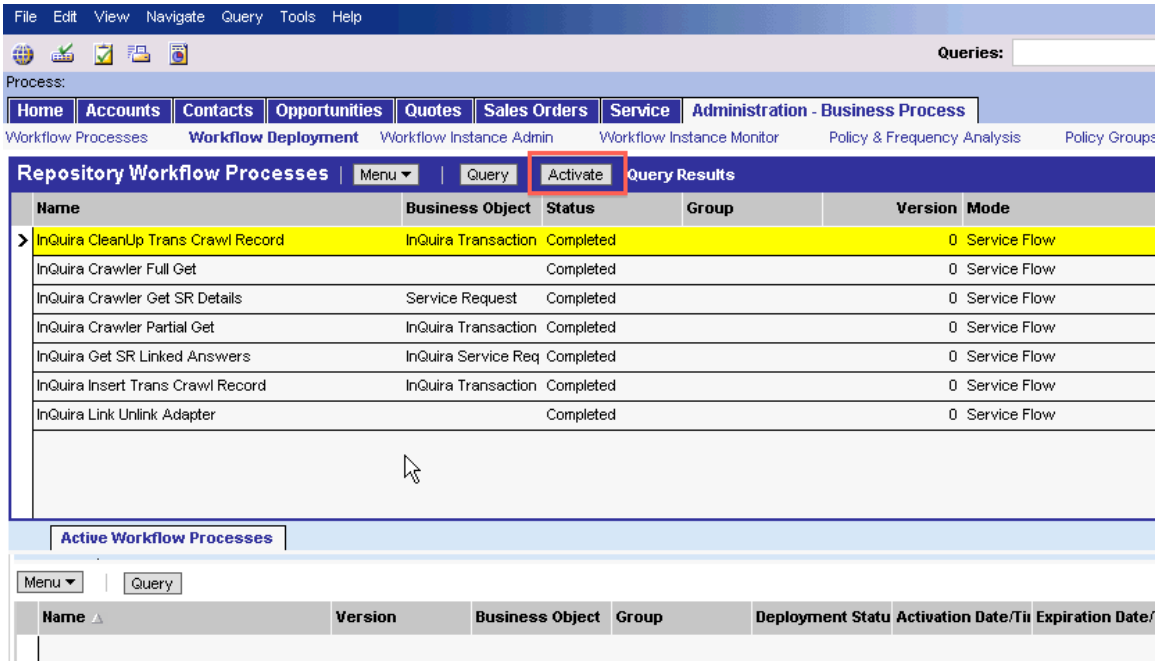
1. Log into Siebel application and navigate to **Site Map** by clicking on the Site Map icon on top left corner of the application.



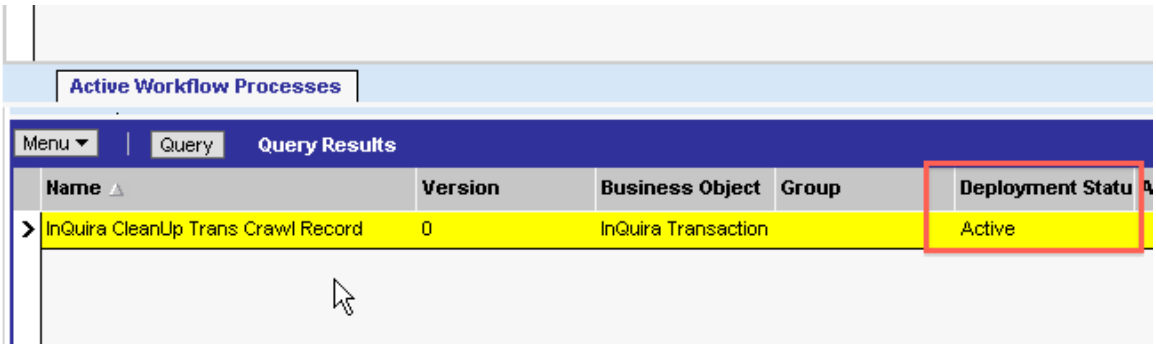

2. Select **Administration – Business Process** from the site map and navigate to **Workflow Deployment** view.



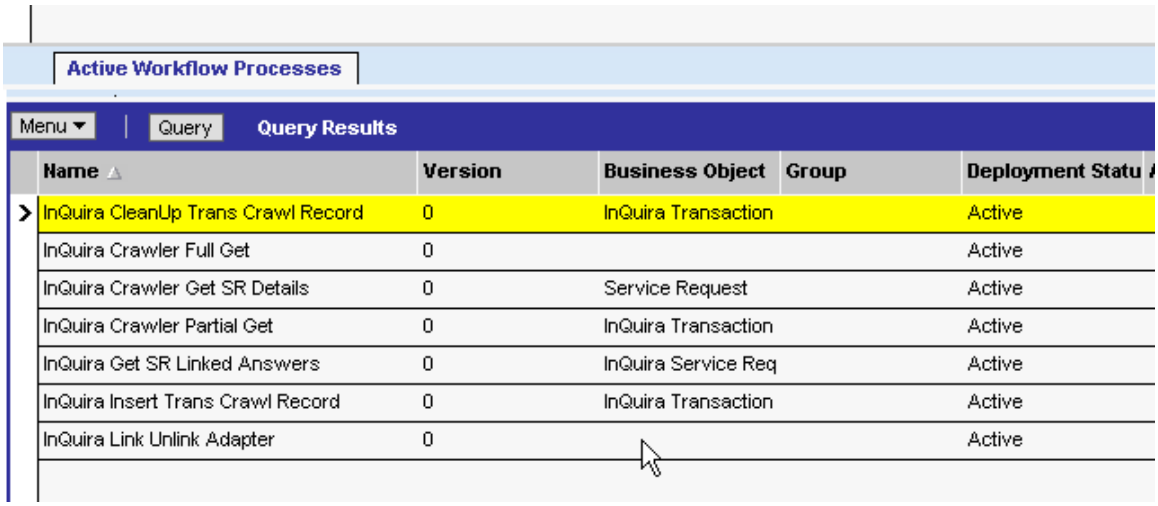

3 Query for the imported workflows by using **InQuira*** criteria.




4 Select the workflow and click the **Activate** button (highlighted above). In the **Active Workflow Processes** applet below, query and refresh the records to confirm that the deployed workflow is now *Active* by confirming the status displayed in the **Deployment Status** field.




5 Repeat step 4 to activate rest of the deployed workflows. Confirm the *Active* status in the **Active Workflow Processes** applet.




# Deploying the Updated Repository in the Siebel Environment

Deploy the SRF in the destination environment.

**Note:** This updated SRF must be present in the environment where subsequent setup changes will be made.

After you successfully copy the files in the previous step, restart the Siebel gateway server. After the gateway server has started, restart the Siebel server. The Siebel server takes 2-3 minutes to start depending on the platform characteristics and the size of the repository.

CHAPTER 4

# Configuring Content Integration

iConnect for Siebel Contact Center uses the Siebel Portal Framework to perform content integration for the iConnect for Siebel Contact Center. You enable the Siebel application to display Oracle Knowledge content by creating and configuring a Siebel Portal Agent.

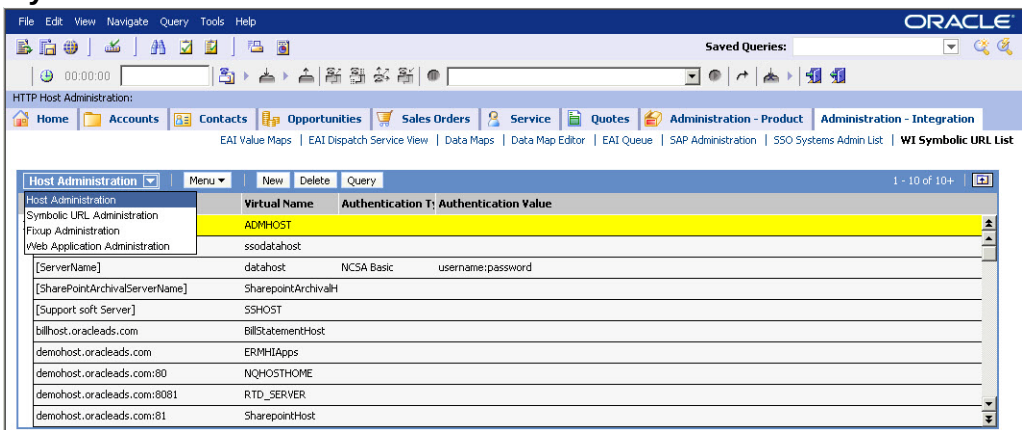
To create and configure a Portal Agent:

- Define the external host as described in “Defining the External Host” on page 33.
- Define the web application as described in “Defining the Web Application” on page 34.
- Define a symbolic URL as described in “Defining a Symbolic URL” on page 35.
- Configure the Oracle Knowledge iConnect properties in Oracle Knowledge System Manager as described in “Configuring iConnect Parameters” on page 36.
- Create the Oracle Knowledge User Responsibility as described in “Creating the Oracle Knowledge User Responsibility” on page 41.
- Define application views as described in “Defining Application Views” on page 41.
- Enable single sign-on as described in “Enabling Single Sign-on” on page 42.

# Defining the External Host

To define an external content host:

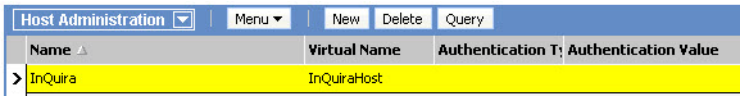
1. In the Siebel application, navigate to the **Site Map > Administration - Integration > WI Symbolic URL List > Host Administration** view




2. Select **New** to create a new record. The field for the new record displays:


3. Enter the following parameters to define the new record:

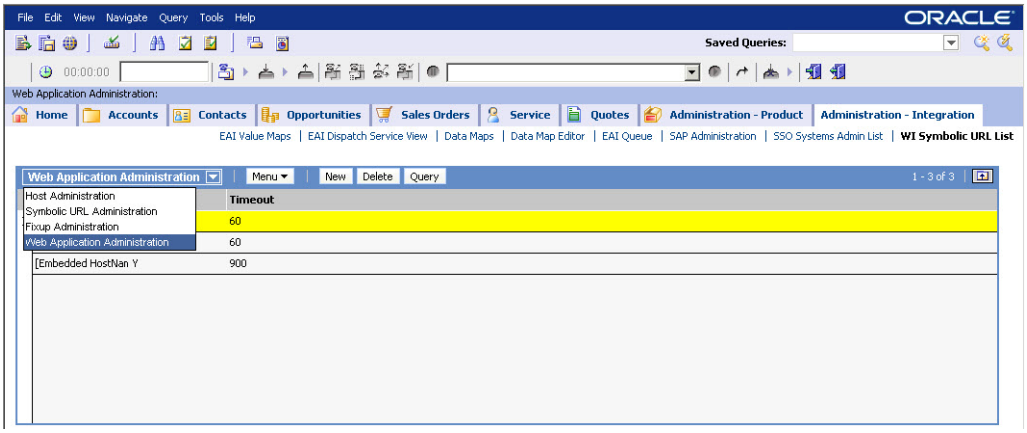
| Parameter | Value |
|---|---|
| **Name** | <hostname> The name of the host machine where Oracle Knowledge is installed. |
| **Virtual Name** | InQuiraHost |
| **Authentication Type** | (blank) |
| **Authentication Value** | (blank) |



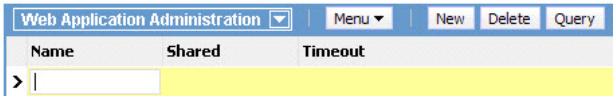
# Defining the Web Application

To define a web application:

1. In the Siebel application, navigate to the **Site Map > Administration - Integration > WI Symbolic URL List > Web Application Administration** view

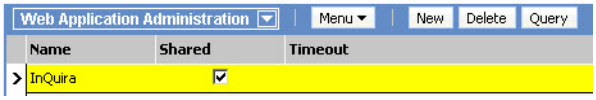



2. Select **New** to create a new record. The field for the new record displays:




3. Enter the following parameters to define the new record:

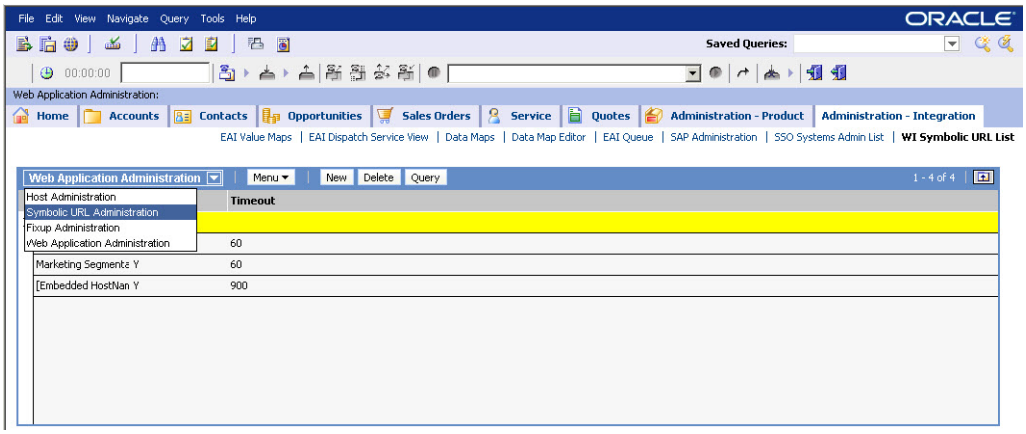
| Parameter | Value |
|---|---|
| **Name** | InQuira |
| **Shared** | Y |
| **Timeout** | (blank) |



# Defining a Symbolic URL

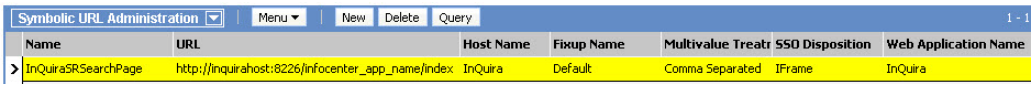
To define a Symbolic URL:

1. In the Siebel application, navigate to the **Site Map > Administration - Integration > WI Symbolic URL List > Symbolic URL Administration** view




2. In the top applet, enter a new record and define the following parameters:

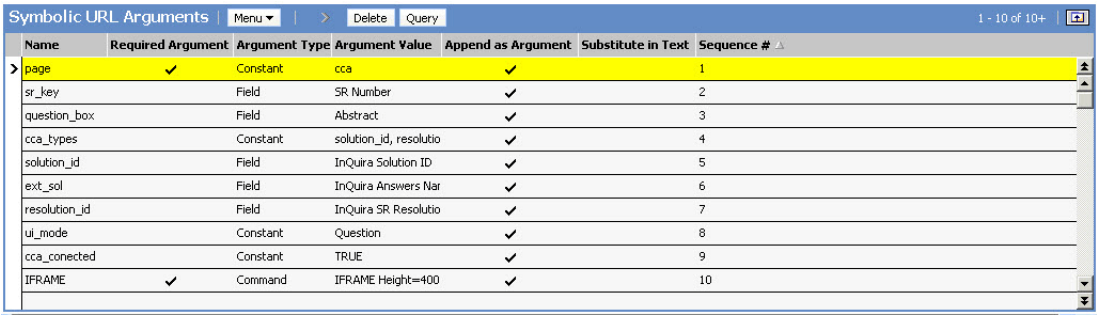
| Parameter | Value |
|---|---|
| **Name** | InQuiraSRSearchPage |
| **URL** | http://inquirahost:8226/infocenter_app_name/index |
| **Hostname** | <hostname> The name of the host machine where Oracle Knowledge is installed. |
| **Fixup Name** | Default |
| **Multivalue Treatment** | Comma Separated |
| **SSO Disposition** | IFrame |
| **Web Application Name** | InQuira |



3 For the Symbolic URL Argument List Applet enter the following arguments records for **InQuiraSRSearchPage**:

Menu > New Record > Enter

| Name | Required Argument | Argument Type | Argument Value | Append as Argument | Substitute in Text | Sequence Number |
|---|---|---|---|---|---|---|
| page | Y | Constant | cca | Y | N | 1 |
| sr_key | N | Field | SR Number | Y | N | 2 |
| question_box | N | Field | Abstract | Y | N | 3 |
| cca_types | N | Constant | solution_id, resolution_id | Y | N | 4 |
| solution_id | N | Field | InQuira Solution Id | Y | N | 5 |
| ext_sol | N | Field | InQuira Answers Name | Y | N | 6 |
| resolution_id | N | Field | InQuira SR Resolution Id | Y | N | 7 |
| ui_mode | N | Constant | Question | Y | N | 8 |
| cca_connected | N | Constant | TRUE | Y | N | 9 |
| IFRAME | Y | Command | IFRAME Height=400 Width=100% Frameborder=0 marginwidth=1 marginheight=1 | Y | N | 10 |
| PostRequest | Y | Command | GetRequest | Y | N | 11 |
| cca_system | Y | Constant | Siebel | Y | N | 12 |
| cca_case_desc | Y | Field | Abstract | Y | N | 13 |
| IsRecordSensitive | N | Command | TRUE | Y | N | 14 |
| user | N | Command | UserLoginId | Y | N | 15 |
| pswd | Y | Command | UserLoginPassword | Y | N | 16 |




# Configuring iConnect Parameters

When you add a web application to a repository and define it, Oracle Knowledge Information Manager deploys the iConnect files and the InfoCenter files. This represents the web pages and the properties file for the web application.

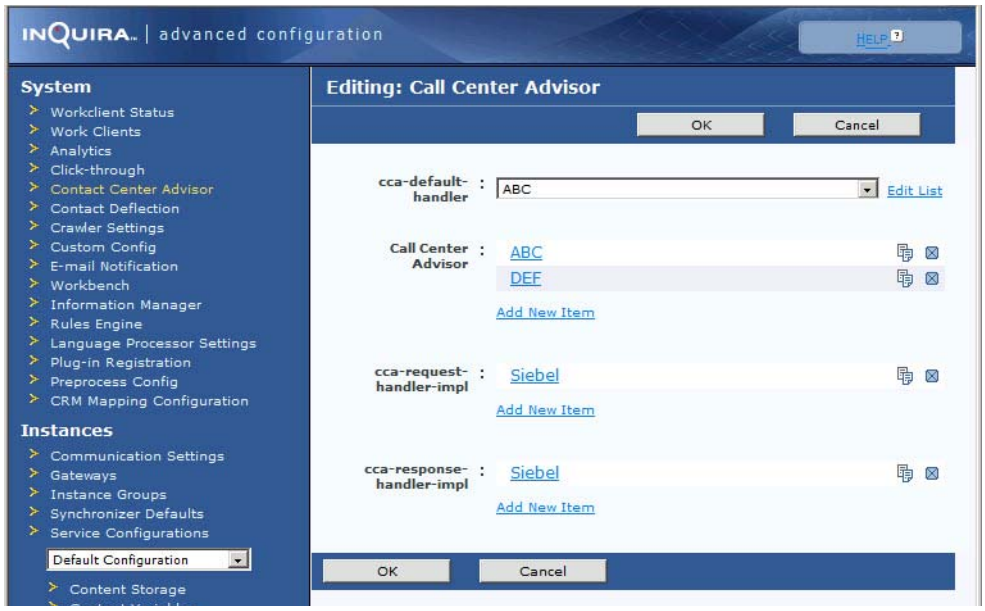
Use the Contact Center Advisor setup in the Advanced Configuration Facility to set and modify the integration parameters for the iConnect and Siebel.

# Edit Call Center Advisor Settings

In Advanced Configuration:

1. In the Oracle Knowledge System Manager, navigate to **Tools > Advanced Config > System > Contact Center Advisor**.
2. Click **Edit**.

The **Editing: Call Center Advisor** screen displays:




3. Enter the following parameters:

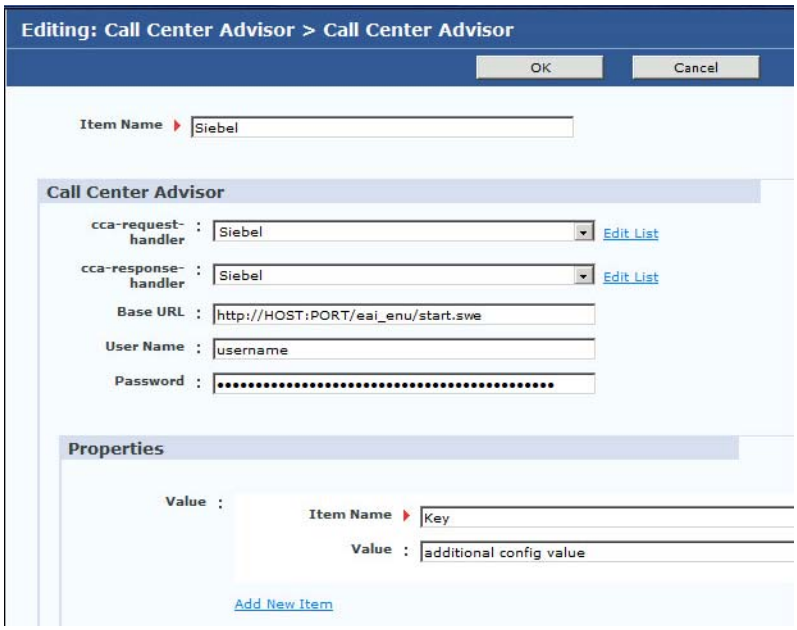
| Property | Description |
|---|---|
| cca-default-handler | Refers to how Oracle Knowledge communicates with Siebel installations. See “Add a Call Center Advisor” below. |
| Call Center Advisor | The default is Siebel. This is the “cca-handler-impl”. This must match what is defined for the “cca_system” on page 36 in the Symbolic URL Argument List. |
| cca-request-handler-impl | For Siebel, use the delivered class name:<br>`com.inquira.request.cca.CCASiebelHandler`<br>For other CRM systems, this must be the java class name and full path for the CRM system handler. |
| cca-response-handler-impl | For Siebel, use the delivered class name:<br>`com.inquira.request.cca.CCASiebelHandler`<br>For other CRM systems, this must be the java class name and full path for the CRM system handler. |

# Add a Call Center Advisor

From the **Editing: Call Center Advisor** screen:

1 Click **Add New Item** in the Call Center Advisor section.

The **Editing: Call Center Advisor > Call Center Advisor** screen displays.




2 Review the “Possible Configurations” section and enter the following properties for your configuration:

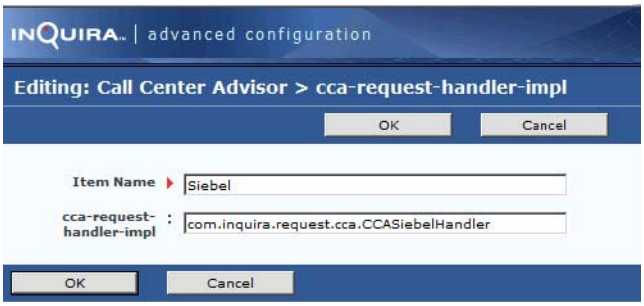
| Property | Description |
|---|---|
| Item Name | Name for the CCA configuration. This used to register this CRM handler and help to locate this handleImp by the Oracle Knowledge CCA framework. |
| cca-request-handler-impl | For Siebel, use the delivered class name:<br>`com.inquira.request.cca.CCASiebelHandler`<br>For other CRM systems, this must be the java class name and full path for the CRM system handler. |
| cca-response-handler-impl | For Siebel, use the delivered class name:<br>`com.inquira.request.cca.CCASiebelHandler`<br>For other CRM systems, this must be the java class name and full path for the CRM system handler. |
| Base URL | The URL associated with the configured Siebel system. This is used to access web services. |
| User Name | The user name login associated with the Siebel server. |
| Password | The password associated with the above user name, used to access the Siebel server. |
| Properties | Add any additional configurable properties, if necessary. To modify select **Add New Item**. |

## Add a cca-handler-impl

From the **Editing: Call Center Advisor** screen:

1 Click **Siebel** in the cca-request-handler-impl section.

The **Editing: Call Center Advisor > cca-request-handler-impl** screen displays.

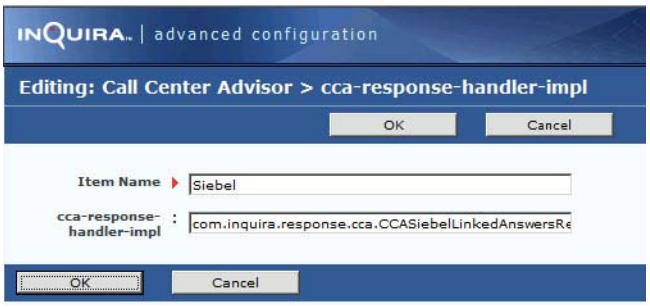



**2** Review the "Possible Configurations" section and enter the following properties for your configuration:

| Property | Description |
|---|---|
| Item Name | Enter a name for the cca-handler-imp. The Item Name must match what is defined for the "cca_system" on page 36 in the Symbolic URL Argument List. The default is Siebel |
| cca-request-handler-impl | For Siebel, use the delivered class name:<br>`com.inquira.request.cca.CCASiebelHandler`<br>For other CRM systems, this must be the java class name and full path for the CRM system handler. |

**3** Click **Siebel** in the cca-response-handler-impl section.

The **Editing: Call Center Advisor > cca-response-handler-impl** screen displays.




**4** Review the "Possible Configurations" section and enter the following properties for your configuration:

| Property | Description |
|---|---|
| Item Name | Enter a name for the cca-handler-imp. The Item Name must match what is defined for the "cca_system" on page 36 in the Symbolic URL Argument List. The default is Siebel |
| cca-response-handler-impl | For Siebel, use the delivered class name:<br>`com.inquira.request.cca.CCASiebelHandler`<br>For other CRM systems, this must be the java class name and full path for the CRM system handler. |

# Possible Configurations

## PRIMARY CCA CONFIGURATION

To configure one Siebel 7.8, 8.0, or 8.1 system, using iConnect 8.1.3:

1. Create a CCA configuration. See “Add a Call Center Advisor” on page 37.
2. Create a cca_handler_imp. See “Add a cca-handler-impl” on page 38.
3. Pass the symbolic URL with a cca_system matching the Item Name for the cca_handler_imp, as defined in “Defining a Symbolic URL” on page 35.

## SECONDARY CCA CONFIGURATION

To configure an additional Siebel 7.8, 8.0, or 8.1 system, using iConnect with 8.1.3:

1. Create a second CCA configuration. See “Add a Call Center Advisor” on page 37.
2. Create a second cca_handler_imp. See “Add a cca-handler-impl” on page 38.
3. Pass the symbolic URL with a cca_system matching the Item Name for the second cca_handler_imp, as defined in “Defining a Symbolic URL” on page 35.

## ADDITIONAL THIRD-PARTY CCA CONFIGURATION

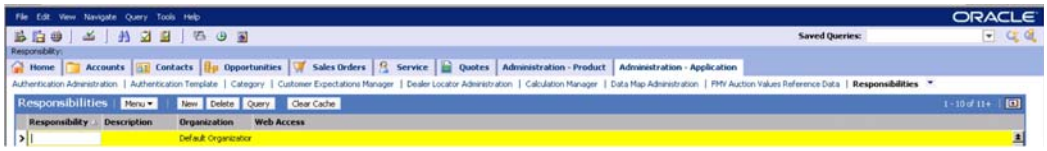
To configure a third-party CRM system (e.g. Clarify or PeopleSoft), using iConnect with 8.1.3:

1. Create a CCA configuration. See “Add a Call Center Advisor” on page 37.
2. Create a cca_handler_imp. See “Add a cca-handler-impl” on page 38.
3. Pass the symbolic URL with a cca_system matching the Item Name for the cca_handler_imp, as defined in “Defining a Symbolic URL” on page 35.

# Creating the Oracle Knowledge User Responsibility

To create Oracle Knowledge user responsibility:

1. In the Siebel Application, navigate to **Site Map > Administration - Application > Responsibilities** view.
2. Select **Menu > New Record** or click **New** on the title bar to create a new record.
   The field for the new record displays:




3. Enter the following parameters for the new record:

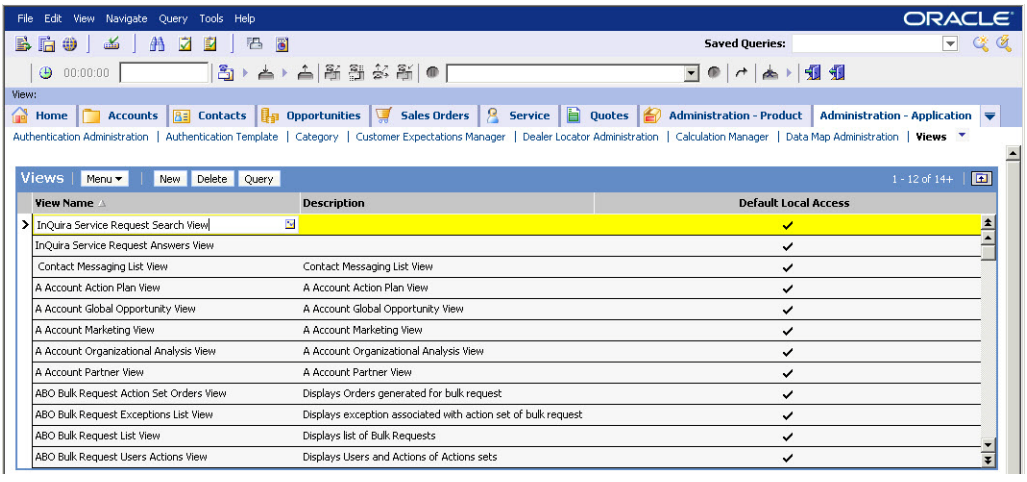
| Parameter | Value |
|---|---|
| Responsibility | InQuira User |
| Organization | Default organization |

4. Select **Menu > Save Record** to save the newly created record.

# Defining Application Views

To define Application Views:

1. In the Siebel application, navigate to **Site Map > Administration – Application > Views**




2. Click **New** and enter two new records, specifying the following parameters:

| Parameter | Value |
|---|---|
| View Name | InQuira Service Request Answers View |
| Description | (optional) |
| Default Local Address | Y |

| Parameter | Value |
|---|---|
| View Name | InQuira Service Request Search View |
| Description | (optional) |
| Default Local Address | Y |

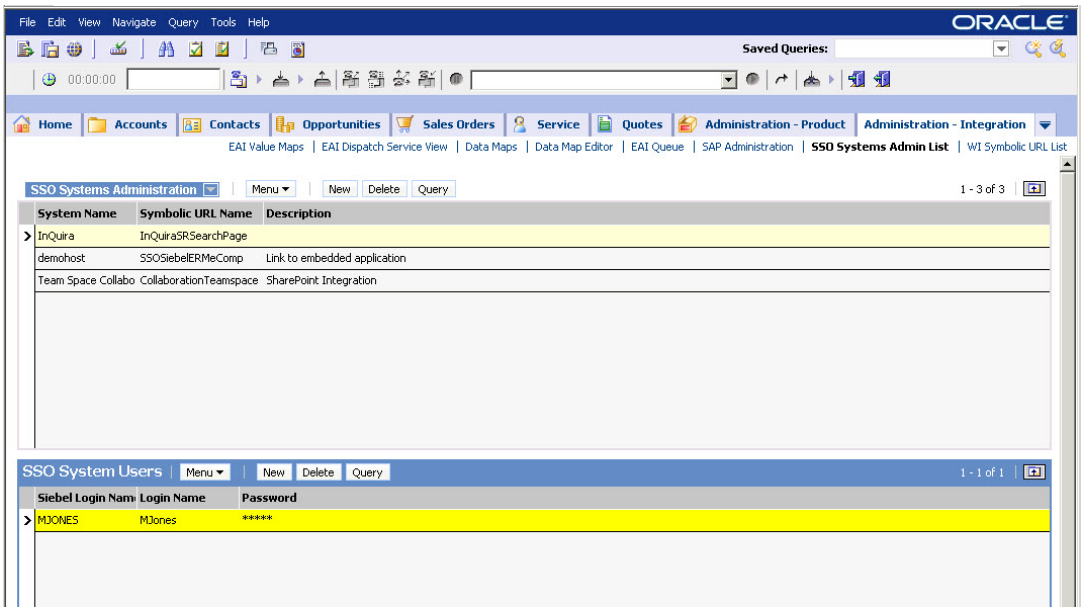
3 Add both Views to the Oracle Knowledge User Responsibility. For more information, see “Creating the Oracle Knowledge User Responsibility” on page 41.

# Enabling Single Sign-on

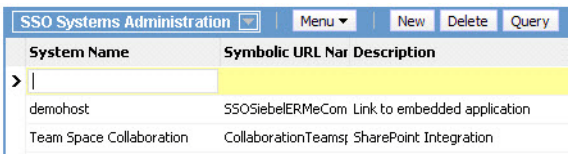
The Oracle Knowledge InfoCenter supports user single sign-on functionality. Single sign-on allows users to automatically log into the Oracle Knowledge InfoCenter when the user logs into Siebel.

To enable single sign-on:

1 Navigate to **Site Map > Administration – Integration > SSO Systems Admin List > SSO Systems Administration**




2 Select **New** to create a new record. The field for the new record displays as:




3 Define a new record, using the following parameters:

| Parameter | Value |
|---|---|
| **System Name** | InQuira[1] |
| **Symbolic URL Name** | InQuiraSRSearchPage |

| | |
|---|---|
| **Description** | (optional) |
| **SSO System Users** | |
| **Siebel Login Name** | User name to log into Siebel. |
| **Login Name** | User name to log into Oracle Knowledge InfoCenter. |
| **Password** | Password corresponding to the Login Name. Oracle recommends that the password entered here is encrypted. See “Oracle Knowledge InfoCenter Password” for more information about the password. |

1. This is an arbitrary designation for reference. Any name can be entered here.

## Oracle Knowledge InfoCenter Password

The integration from Siebel user to auto login to InfoCenter/iConnect requires full Oracle Knowledge authorization and the password must encrypted for the SSO mapping on the Siebel side. InfoCenter decrypts this password when the Siebel request is intercepted. If the auto login fails, InfoCenter considers the user an anonymous user into InfoCenter.

The encryption algorithm is configurable through the CRYTO_CLASS_NAME property in config.properties for each InfoCenter/iConnect web application. You manage the encryption through the IM console. Navigate to Tools > System > Configure Go to Expert Mode. The default Oracle Knowledge user password encrypt/decrypt class name configuration is:

```
CRYTO_CLASS_NAME=com.inquira.foundation.utilities.CVEncryption
```

The Oracle Knowledge user's password entered in the Siebel system has to be encrypted by the same implementation entered here so it can be properly decrypted. You can choose the encrypted password from the IM database to enter into the Siebel System.

You can customize the encryption and decryption algorithm implementation by filling the entry of "CRYTO_CLASS_NAME". Again, the same algorithm implementation must apply to the Oracle Knowledge user's password on the Siebel side for encryption and the Oracle Knowledge side for decryption.

To disable this password decryption, you can choose to make the "CRYTO_CLASS_NAME" entry empty in the configuration. In this case, InfoCenter considers the password to be sent over in clear text format with no encryption on it at all.

**Important!** Sending a password in clear text raises security concerns and is not recommended.

Using HTTPS communication between Siebel and InfoCenter/iConnect further improves the security for sensitive data.

**Note:** This password encryption/decryption only affects the autologin for system integration. It does not affect the normal login process, being native Oracle Knowledge implementation, or LDAP or any custom made implementation through iAuthenticate.

CHAPTER 5

# Configuring Data Integration

The iConnect for Siebel Contact Center uses the Siebel EAI Framework for data integration between the Oracle Knowledge and Siebel applications. This HTTP request-response based integration uses Siebel as a service. The inbound EAI request invokes a workflow in Siebel to insert and update data, and uses the Siebel Data Mapping Service to transform data between the Oracle Knowledge XML format and Siebel's internal format.

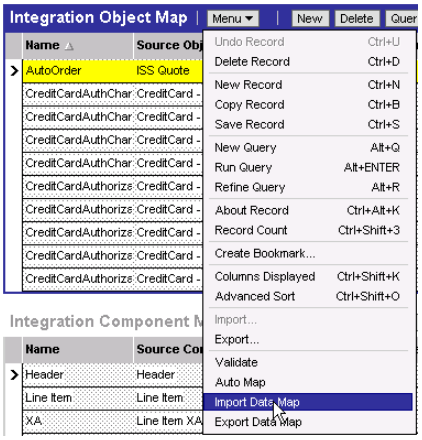
To configure data integration:

- Import the data map as described in “Importing the Data Map” on page 44
- Import the web services as described in “Importing the Web Services” on page 45
- Configure the Service Request as described in “Configuring the Service Request” on page 46

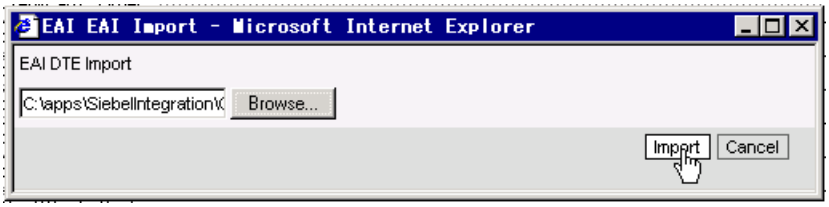
## Importing the Data Map

To import the Data Map:

1. Navigate to **Site Map > Administration - Integration > Data Map Editor**
2. Select **Import Data Map** in the Integration Object Map applet.




The EAI Import dialog displays:




3. Click **Browse** and navigate to the following directory:

```
<InQuira_home>\archive\siebel\CCA\DataMaps\
```

to locate the following iConnect data map files:

- `InQuiraLinkUnlinkSRDM.XML`
- `InQuiraSRLinkedAnswersDM.XML`

**Note:** If you receive the following error:

```
Cannot find entry 'InQuira Link Unlink External IO'(or 'InQuira SR Linked Answers
IO') in the bounded picklist for the field 'Source Object Name' in integration
component 'EAI Object Map'(SBL-EAI-04401)
```

It is likely caused by the `siebel_sia.srf` not being copied over the existing `siebel_sia.srf`. See “Compiling the Siebel Repository” step 4 for more information.

4 Click **Import**.

5 Click **Browse** and navigate to the `InQuiraSRDetails.XML` file in the following directory:

```
<InQuira_home>\archive\siebel\CRAWLER\DataMaps\
```

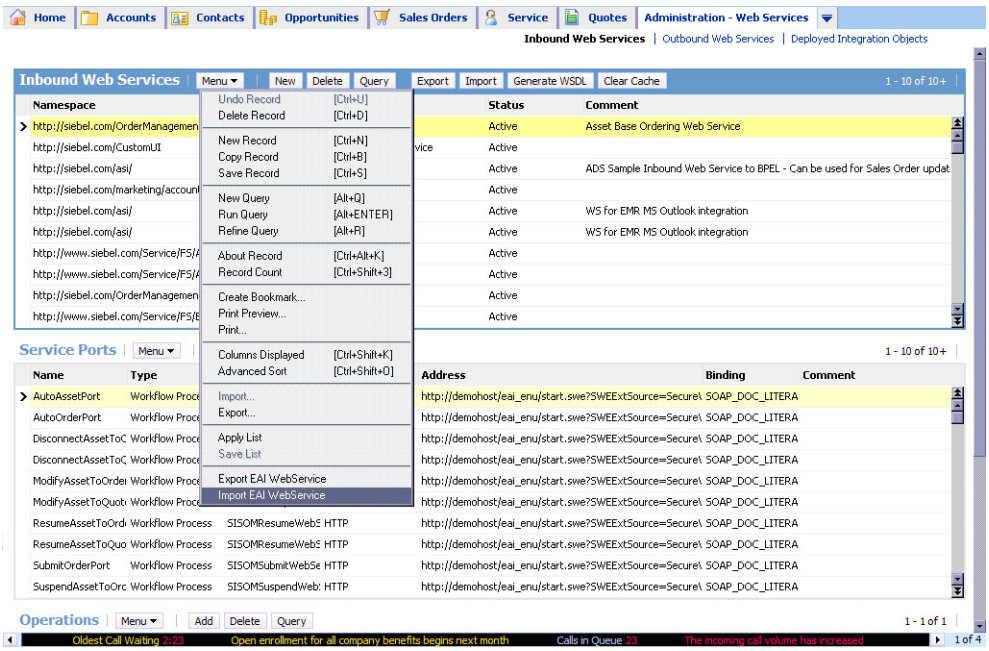
6 Click **Import**.

# Importing the Web Services

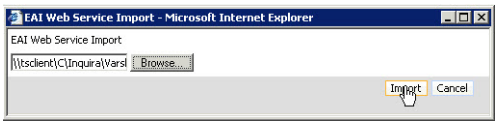
To import the Oracle Knowledge iConnect web services:

1 Navigate to **Sitemap > Administration - Web Services > Inbound Web Services**.

2 Select Menu > Import EAI WebService.



The EAI Web Service Import window displays.




3. Click **Browse** and navigate to the `InQuiraSRLinkedAnswers.XML` file in the following directory:

   `<InQuira_home>\archive\siebel\CCA\WebService\`

4. Click **Import**.

   Siebel Tools imports the Oracle Knowledge web services files.

5. Select the record you just imported into the Inbound Web Services Applet.

6. Click on the Service Ports applet.

7. Modify the Address field for all the records in that applet to use the correct **host name**, **user name**, and **password**. The URL is in the following format:

   `http://<Siebel server host name>/eai_enu/start.swe?SWEExtSource=WebService&SWEExtCmd=Execute&UserName=<Siebel user name>&Password=<password>`

8. Click **Browse** and navigate to the `InquiraCrawler.XML` file in the following directory:

   `<InQuira_home>\archive\siebel\CRAWLER\WebService`

9. Click **Import**.

   Siebel Tools imports the Oracle Knowledge web services files.

**Important!** Click the **Clear Cache** button when you finish importing the web services.

# Configuring the Service Request

After the successful import of the Siebel SIF files and the steps covered in the earlier chapters, the following activities must be completed to complete the configuration.

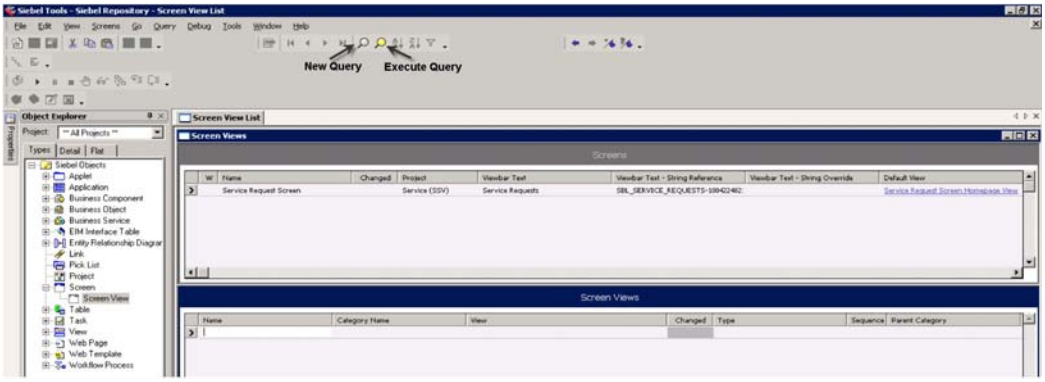
- **Configuring Service Request Screen**
- **Configuring Service Request Business Object**

## Configuring Service Request Screen

To configure the Service Request Screen:

1. In the Siebel Tools application, click **Screen** on the Object Explorer to display the Screens on the right hand side pane.

2. Click **New Query** on the List tool bar to start a search.




3 Enter ”Service Request Screen” in the name column of the Screens window at the top and click Execute Query on the List tool bar.

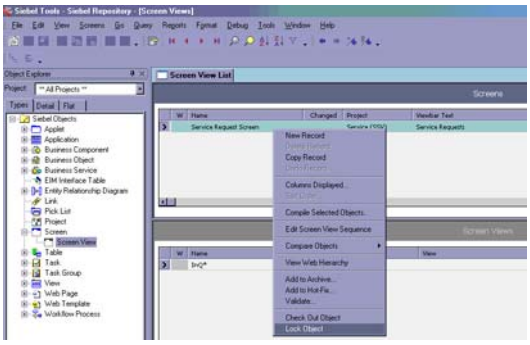
4 Click the + sign in front of the Screen on the Object Explorer and in the expanded list, click on Screen View.

A bottom pane opens displaying the Screen Views that appear under the Service Request Screen.

5 Click anywhere on the Screen Views window > New Query. Enter ”InQ*” in the Name column and click the Execute Query icon on the List tool bar. You should not see any views starting with ”InQ”.

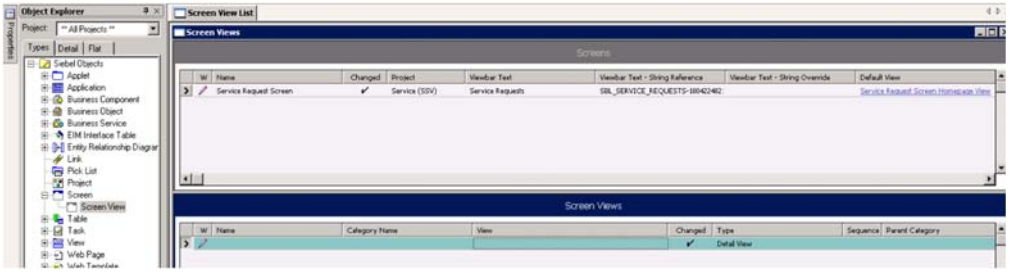
6 Select the ”Service Request Screen” on the Screens view by clicking on the record.

7 With the record selected, right-click to display the context sensitive menu and select **Lock Object** at the bottom.



8 Click anywhere on the Screen Views window and right-click to display the context sensitive menu and select **New Record** from the menu.

The field for the new record displays:



9 Enter the following parameters shown under Record1 Value for the new record:

| Parameter | Record1 Value | Record2 Value |
|---|---|---|
| Name | InQuira Service Request Answers View[1] | InQuira Service Request Search View[1] |
| View | InQuira Service Request Answers View | InQuira Service Request Search View |
| Changed | Y | Y |
| Type | Detail View | Detail View |
| Sequence | 1,000 | 1,001 |
| Parent Category | Service Request List | Service Request List |
| Display In Page | Y | Y |
| Viewbar Text - String Override | Linked Answers | Find Answers |
| Display In Site Map | Y | Y |
| Menu Text - String Override | Linked Answers | Find Answers |
| Status Text - String Override | Linked Answers | Find Answers |
| Comments | created for InQuira iConnect | created for InQuira iConnect |
| Inactive | N | N |
| Upgrade Behavior | Preserve[2] | Preserve[2] |

1. This field populates when the View is entered.
2. This field is not editable. After the Service Request Screen is unlocked, the Upgrade Behavior value defaults to **Preserve** for both records.

10 Repeat step 8 and step 9 to create another new record with the values shown under Record2 Value.

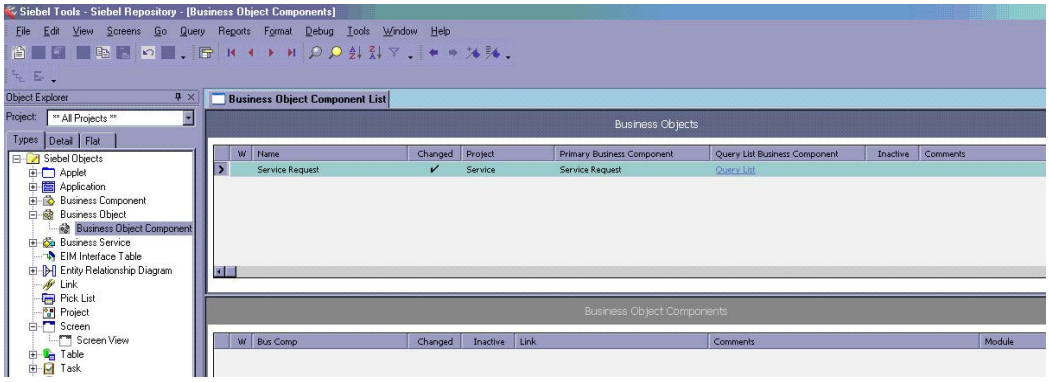
11 After both records have been added, unlock the Service Request Screen.

# Configuring Service Request Business Object

To configure Service Request Business Object:

1 In the Siebel Tools application, click on Business Object on the Object Explorer to display the Business Objects on the right hand side pane.

2 Click **New Query** on the List tool bar to start a search.




3 Enter ”Service Request” in the Name column of the Business Objects window at the top and click Execute Query on the List tool bar.

4 Click on the + sign in front of the Business Object on the Object Explorer and in the expanded list, click on Business Object Component. A bottom pane opens displaying the Business Object Components under the Service Request Business Object.

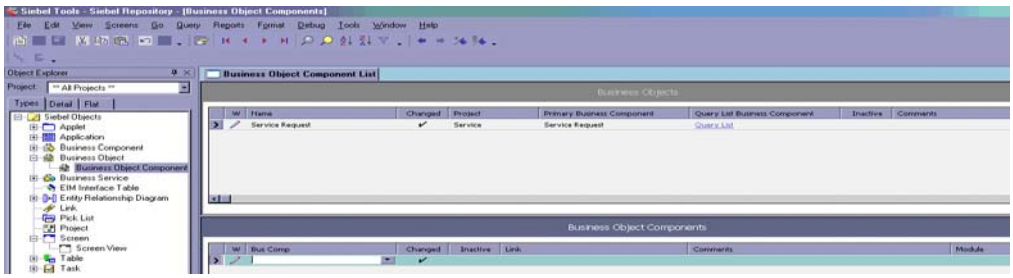
5 Click anywhere on the Business Object Components window > New Query. Enter ”InQ*” in the Bus Comp column and click Execute Query on the List tool bar. You should not see any Business Object Components starting with ”InQ”.

6 Select ”Service Request” on the Business Object view by clicking on the record.

7 With the record selected, click the right mouse button to pop the context sensitive menu and select ”Lock Object” option at the bottom.

8 Click anywhere on the Business Object Components window and click the right mouse button to pop the context sensitive menu and select ”New Record” from the menu.

The field for the new record displays:



9 Enter the following parameters shown under Record1 Value for the new record:

| Parameter | Record1 Value | Record2 Value |
|---|---|---|
| Bus Comp | InQuira Answers | InQuira Answers EAI |
| Changed | Y | Y |
| Inactive | N | N |
| Link | Service Request/InQuira Answers | Service Request/InQuira Answers EAI |
| Comments | Created for InQuira iConnect | Created for InQuira iConnect |

10 Repeat step 8 and step 9 to create another new record with values as shown under Record2 Value.

11 After both records have been added, unlock the Service Request Screen.

**Important!** After completing the Service Request Screen and Business Object modifications in Siebel tools, compile all of the changes. After a successful compilation, unlock all of the locked projects on the Siebel Server.

CHAPTER 6

# Configuring the iConnect Integrated User Interface

This chapter describes:

- **Interacting with the Oracle Knowledge Application**
- **Adjusting the iFrame Height**

## Interacting with the Oracle Knowledge Application

The Oracle Knowledge iConnect application can be embedded into the Siebel CRM interface or be launched as a new pop-up window. The user interacts with Oracle Knowledge through the iConnect application, with options to refine their search, navigate through content, provide feedback, or recommend changes to content or create or edit content. The user has a direct link into the Oracle Knowledge authoring environment from iConnect.

In addition, the Oracle Knowledge iConnect application has browser requirements.


To set the browser requirements:

1. In Internet Explorer, select Tools > Internet Options.
2. Select the Privacy tab.
3. Click the **Advanced** button.
4. Select **Override automatic cookie handling.**
5. Select **Always allow session cookies**.
6. Click **OK**.

# Adjusting the iFrame Height

You can configure the height of the search results frame within the Siebel application.

The IFrame feature is used to display Oracle Knowledge content within the Siebel application. The height of IFrame determines the height of Siebel applet used to render the Oracle Knowledge content.

- Edit the `Height` parameter of the IFRAME argument as specified in “Defining a Symbolic URL” on page 35. The default iConnect value is:

  ```
  IFRAME Height=400...
  ```

- Change the value of the `Height` parameter to the desired value.
- Update the Siebel application.

APPENDIX A

# Deploying Intelligent Search for Siebel

You deploy iConnect for Siebel Contact Center components within both the Siebel server environment using the Siebel Tools application, and within the Siebel client application.

To deploy iConnect for Siebel Contact Center complete the following:

- **Deploying the Content Converter Style Sheet**
- **Importing the Runtime Event**

The integration process supplies and configures components, such as the Oracle Knowledge Workflow, within the Siebel environment to enable Oracle Knowledge to access content associated with various Siebel objects.

**Important!** We strongly recommend that you stop the Siebel server before deploying iConnect for Siebel Contact Center.

## Deploying the Content Converter Style Sheet

The iConnect for Siebel Contact Center content converter uses a pair of style sheets `main.xsl` and `sr_transformation.xsl` (called by `main.xsl`) to translate the Siebel XML output to the Oracle Knowledge IQXML input format.

To deploy the converter style sheets:

- Copy the files `main.xsl` and `sr_transformation.xsl` from the installation directory:
  <InQuira_home>\archive\siebel\xsl\

  to the webserver directory; for example, if using an Apache Tomcat webserver:
  <Apache_home>\tomcat\common\classes

  and to the InQuira directory:
  <InQuira-home>\inquira\int\xsl

## Modifying the Siebel Content Converter

You can edit the `sr_transformation.xsl` file to process Siebel XML output associated with custom integration objects. The Integration Object definition specifies which fields will be included in the exported XML file. You can specify conversion for all of the fields defined in the Integration Object, or optionally restrict the fields that will be processed as content by omitting them from the translation process.

- Select all the fields you need to be included as content.

### Conversion Example

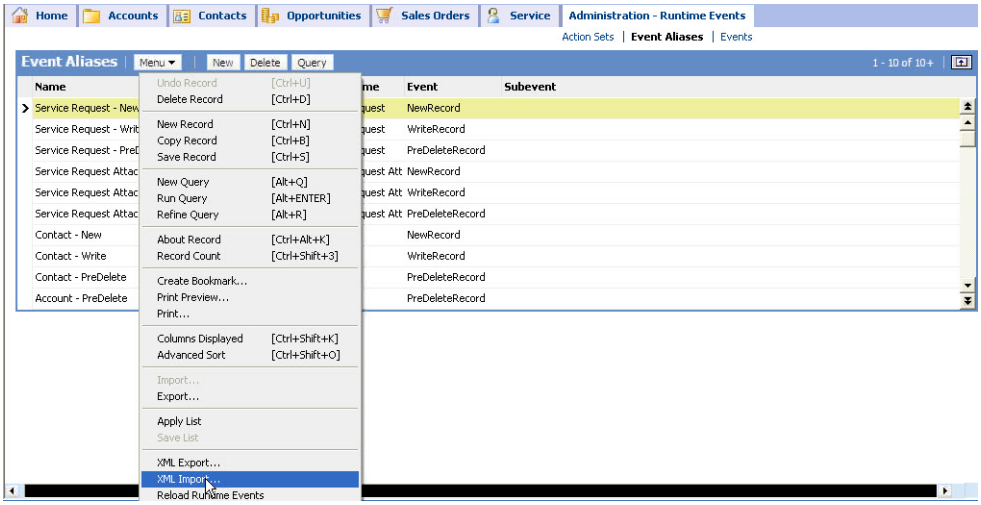
```
<?xml version="1.0" encoding="ISO-8859-1"?>
<xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/
Transform">
<xsl:output omit-xml-declaration="yes"/>
  <xsl:template match="/ServiceRequest">
     <iqxml>
      <document>
          <xsl:if test="Area/text()" >
          <facet>CRM-AREA.<xsl:value-of select="Area"/></facet>
        </xsl:if>
          <xsl:if test="CreatedByName/text()" >
          <facet>CRM-CREATE_BY_NAME.<xsl:value-of select="CreatedByName"/></facet>
        </xsl:if>
          <xsl:if test="Sub-Area/text()" >
          <facet>CRM-SUB_AREA.<xsl:value-of select="Sub-Area"/></facet>
        </xsl:if>
          <xsl:if test="Sub-Status/text()" >
          <facet>CRM-SUB_STATUS.<xsl:value-of select="Sub-Status"/></facet>
        </xsl:if>
        <xsl:if test="SRType/text()" >
         <facet>CRM-INFORMATION_TYPE.<xsl:value-of select="SRType"/></facet>
        </xsl:if>
        <xsl:if test="Priority/text()" >
          <facet>CRM-PRIORITY.<xsl:value-of select="Priority"/></facet>
        </xsl:if>
        <xsl:if test="Status/text()" >
          <facet>CRM-STATUS.<xsl:value-of select="Status"/></facet>
        </xsl:if>
        <section>
          <subsection>
            <title><xsl:value-of select="SRNumber"/></title>
            <p><xsl:value-of select="Abstract"/></p>
            <p><xsl:value-of select="AccountComment"/></p>
            <p><xsl:value-of select="Account"/></p>
            <p><xsl:value-of select="Area"/></p>
```

```
            <p><xsl:value-of select="CreatedByName"/></p>
            <p><xsl:value-of select="Description"/></p>
            <p><xsl:value-of select="Priority"/></p>
            <p><xsl:value-of select="Reproduce"/></p>
            <p><xsl:value-of select="ResolutionCode"/></p>
            <p><xsl:value-of select="SRRootcause"/></p>
            <p><xsl:value-of select="SRType"/></p>
            <p><xsl:value-of select="ServiceRequestType"/></p>
            <p><xsl:value-of select="Severity"/></p>
                        <p><xsl:value-of select="Source"/></p>
                        <p><xsl:value-of select="Status"/></p>
                        <p><xsl:value-of select="Sub-Area"/></p>
                        <p><xsl:value-of select="Sub-Status"/></p>
                        <p><xsl:value-of select="Type"/></p>
                        <p><xsl:value-of select="Version"/></p>
            <xsl:apply-templates select="ListOfAction/Action"/>
          </subsection>
        </section>
      </document>
    </iqxml>
  </xsl:template>

  <xsl:template match="ListOfAction/Action">
    <xsl:if test="position()=1">
        <p><xsl:value-of select="Description2"/></p>
        <p><xsl:value-of select="DueDate"/></p>
        <p><xsl:value-of select="Priority"/></p>
        <p><xsl:value-of select="Status"/></p>
                <p><xsl:value-of select="Type"/></p>
    </xsl:if>
  </xsl:template>

</xsl:stylesheet>
```

# Importing the Runtime Event

To import the Oracle Knowledge crawler runtime event:

1. Navigate to Sitemap > Administration - Runtime Events > Event Aliases.
2. Select Menu, XML Import.




The Import File window displays.


3. Click **Browse** and navigate to the RTE.xml file.

   `<InQuira_home>\archive\siebel\CRAWLER\RunTimeEvents\`

4. Select the RTE.xml file and click **Open**.

The Import File dialog box displays. Click **OK**.


5. Siebel Tools imports the Oracle Knowledge runtime event files.

APPENDIX B

# Configuring Oracle Knowledge Content Processing

You configure Oracle Knowledge to process Siebel content so that it is available to Intelligent Search by configuring and scheduling a Siebel crawler. The Siebel Crawler supports the Service Request and Defect business objects; however, you can customize the Siebel crawler access content within other Siebel objects.

**Note:** We recommend that you consult with Oracle Consulting Services for assistance with customizing the Siebel crawler.

The Siebel crawler runs as a scheduled job that you define and administer using the Advanced Configuration Facility Scheduler, as described in the *"Intelligent Search Administration Guide"*.

You tailor the presentation of answers from Siebel content using custom java server pages (JSPs). See "Specifying the URL for Displaying Siebel Answers within Oracle Knowledge" on page 59 more information.

This chapter discusses:

- **Configuring Siebel Content Acquisition**
- **Updating the Content Store**
- **Updating the Dictionary (Optional)**

## Configuring Siebel Content Acquisition

You configure access to Siebel content using the Crawler Settings page of the Advanced Configuration Facility. The *"Intelligent Search Administration Guide"* provides details on accessing and using the Advanced Configuration Facility.

Each crawler configuration defines a document collection. You specify various crawler parameters, as described in *"Specifying Siebel Crawler Parameters"*.

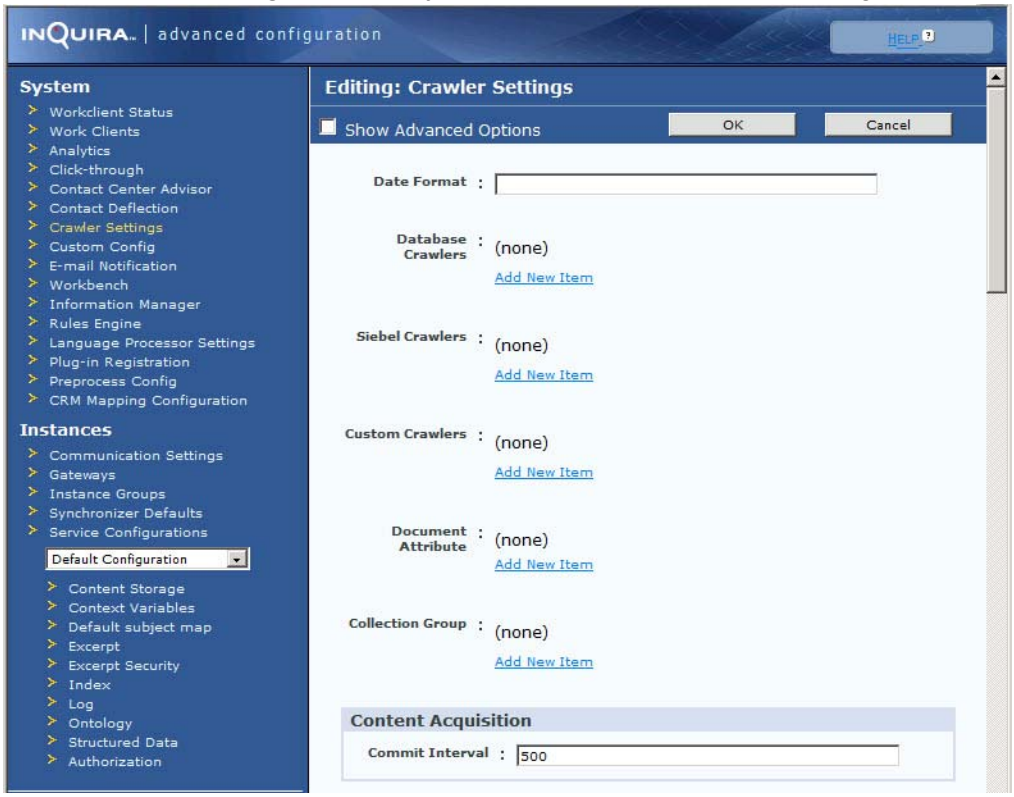
**Important!** A Siebel collection can access only one Business Object type. You must create and configure a unique Siebel crawler for each object type that you want to access.

### Specifying Siebel Crawler Parameters

You configure the crawler's connection to the Siebel application on the **Crawler Settings > Siebel Crawlers** page of the Advanced Configuration Facility.

To configure the Siebel crawler:

1 Select **Crawler Settings** from the System section of the Advanced Configuration Facility main menu




The **Crawler Settings** page lists the available crawlers.

2 Click **Edit**.

3 Under **Siebel Crawlers** click **Add New Item**.

The **Siebel Crawlers** page displays the crawler configuration fields.


4 Specify the following crawler parameters:

| Parameter | Description |
|---|---|
| **connection URL** | Specifies the URL of the Siebel application. This parameter is required. There is no default value. |
| **siebelDataMapKey** | Value must match the DataMap name specified on Siebel, delivered as InquiraSRDetails. |
| **Xsl location** | The xsl file location for the Content Converter Style sheet. |
| **User** | Specifies the user name for access to the Siebel application content. This parameter is required. There is no default value. |
| **Password** | Specifies the user password for access to the Siebel application content. This parameter is required. There is no default value. |
| **Date Format** | The date format for the Siebel User (depends on the locale information for the user). |
| **siebelBatchCount** | The batch count to retrieve Siebel records at one web service call. |
| **Available for Unstructured Search** | Specifies that the collection will be available to the Unstructured retrieval module. On is the default. |

| Parameter | Description *(continued)* |
|---|---|
| **unstructuredAttribute** | Specifies whether the documents in this collection will be available to the unstructured information retrieval module. This parameter is required. Valid values are `On` and `Off`. `On` is the default. |
| **documentFilter** | Specifies one or more optional filters to limit the documents that will be included in the collection. Valid values are defined document filters, as described in Configuring Document Filters in the *"Intelligent Search Administration Guide"*. |
| **Document Attribute Selector** | Specifies one or more optional document attribute selectors for the crawler. Valid values are defined document attribute selectors, as described in Configuring Document Attributes in the *"Intelligent Search Administration Guide"*. |
| **Document Supertitle Selector** | Specifies one or more optional document supertitle selectors for the crawler. Valid values are defined document supertitle selectors, as described in Configuring Document Supertitles in the *"Intelligent Search Administration Guide"*. |
| **SiebelBuildURL** | Specifies a default class name and method to use the presentation JSP to display answers from Siebel content within the Oracle Knowledge User Interface. The default is class name is `com.inquira.content.SampleBuildURL`.<br>The default is method is `contentStoreURL`. |

5 Select **OK** to save the specified values in your configuration.

## Specifying the URL for Displaying Siebel Answers within Oracle Knowledge

Oracle Knowledge uses a Java server page (JSP) to create an ad hoc answer source document for presentation within the User Interface. This section provides example configuration information using the default JSP page (`cs.jsp`); however, you must create a custom page to render the Siebel content appropriately for your application.

You must specify a class and a method to create the URLs for the ad hoc answer documents derived from Siebel content for the specified collection. The Siebel Build URL parameters are specified on the **Advanced Configuration Facility Crawler Settings > Siebel Crawlers** page:

| Parameter | Description |
|---|---|
| **Class Name** | Specifies the Build URL class. The default is `com.inquira.content.SampleBuildURL.` |
| **Method** | Specifies the Build URL method. The default is `contentStoreURL.` |
| **Properties** | Specifies a required property to enable answer highlighting within constructed Siebel answer documents. Specify the URL of the `cs.jsp` page in your application server. The following example shows a typical Apache Tomcat implementation:<br>`http://<tomcat_home>/webapps/inquirawb/cs.jsp` |

# Updating the Content Store

You must perform content processing to add the Siebel content to the Oracle Knowledge application content store. You process Siebel content by scheduling tasks to execute the configured Siebel crawlers.

The *"Intelligent Search Administration Guide"* provides detailed information about scheduling and performing content processing.

# Updating the Dictionary (Optional)

To optimize the accuracy of the Oracle Knowledge search functionality, you may want to add terminology that is specific to the content stored in your Siebel application to the Dictionary, as described in the *"Intelligent Search Administration Guide"*.