



Oracle Knowledge for Service Cloud Integration Guide

*Integrating Oracle Knowledge with
Oracle Service Cloud Agent Desktop and Customer Portal*

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About This Guide

This guide provides detailed instructions and supporting information for installing, configuring, and deploying Oracle Knowledge for Service Cloud. It is intended for application developers and administrators who need to plan for and perform integration of Oracle Knowledge applications with Oracle Service Cloud Agent Desktop and Customer Portal.

This preface includes information on:

- **In This Guide**
- **Examples of Product Screens and Text**
- **Operating System Variations in Examples and Procedures**
- **References to Web Content**

In This Guide

The Oracle Knowledge for Service Cloud Integration Guide is divided into the following sections:

- | | |
|---|--|
| Chapter 1, “Getting Started with Oracle Knowledge for Service Cloud” | This section describes Oracle Knowledge for Agent Desktop and Customer Portal and their integration requirements. |
| Chapter 2, “Adding Oracle Knowledge to Customer Portal” | This section describes how to integrate Oracle Knowledge with Customer Portal. |
| Chapter 3, “Adding Oracle Knowledge to Agent Desktop” | This section describes how to integrate Oracle Knowledge with Agent Desktop incident workspaces, create workspaces, and configure options. |

Examples of Product Screens and Text

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.

Operating System Variations in Examples and Procedures

We generally use Linux screen displays and naming conventions in our examples and procedures. We include other operating system-specific procedures or steps as noted in section headings, or within topics, as appropriate.

We present command syntax, program output, and screen displays:

- in Linux format first
- in other Unix-specific variants only when necessary for proper operation or to clarify functional differences
- in Windows format only when necessary for clarity

References to Web Content

For your convenience, this guide refers 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.

Getting Started with Oracle Knowledge for Service Cloud

Oracle Knowledge for Service Cloud provides a complete intelligent search interface that enables contact center agents and customers to quickly and easily find accurate answers to customer inquiries from within Oracle Service Cloud Agent Desktop and Customer Portal.

Oracle Knowledge leverages 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. Oracle Knowledge technology can automatically incorporate customer context, call context, and CRM contextual information in the search for answers to customer inquiries.

The Oracle Knowledge for Agent Desktop integration embeds Oracle Knowledge search functionality directly within Agent Desktop to maximize agent productivity, minimize keystrokes, and improve call resolution rates. The search results include relevant excerpts that have a high probability of answering an inquiry based on its intent.

Oracle Knowledge significantly streamlines the call wrap-up process by automatically providing embedded links to associate the right enterprise knowledge with each service request resolution task.

You can configure each incident workspace with Oracle Knowledge options according to the profiles assigned to the workspace.

Prerequisites

Before you can integrate Oracle Knowledge with Agent Desktop and Customer Portal, you must have Oracle Service Cloud environment permissions.

Administrators need the following permissions:

- Upload add-ins
- Create and edit profiles
- Workspace designer
- Object designer
- Configuration
- Session authentication
- Open custom report `OK - LinkedAnswersReport` that was imported previously

End users need the following permissions:

- Session authentication
- Read, Add/Edit, and Response for Incidents

- Create and Read for custom objects
- Open custom report `OK - LinkedAnswersReport` that was imported previously

Downloading and Extracting the Installation Files

Extract the following Zip files in any convenient location:

- 1 Download the `RightNowOKiConnectArtifacts.zip` file located in your installation directory.
- 2 Unzip the `RightNowOKiConnectArtifacts.zip` file.
The extraction creates two directories, `AgentDesktop` and `CustomerPortal`. For this part of the installation, use only the files in the `AgentDesktop` directory.
- 3 Sign in to your Oracle Knowledge site as administrator.
- 4 Unzip the `LinkedAnswersCustomObject.zip` file (located in the `AgentDesktop` directory). This file contains XML that adds the `LinkedAnswers` custom object as the `Linked Answers` tab in the workspace.
- 5 Unzip the `LinkedAnswersReport.zip` file (located in the `AgentDesktop` directory) to extract the `LinkedAnswersReport.xml`. This XML file contains the report definition for the report used by the Oracle Knowledge add-in.
- 6 Use the Reports explorer to import the `LinkedAnswersReport.xml` file extracted previously and save the report with the name “OK - Linked Answers Report” in the Public Reports folder.
- 7 Follow the installation instructions in [Chapter 3, Adding Oracle Knowledge to Agent Desktop](#).

Oracle Knowledge for Customer Portal

Oracle Knowledge for Customer Portal is the client-facing site of Oracle Service Cloud that administrators can use to modify customer service web pages.

Oracle Knowledge for Customer Portal embeds Oracle Knowledge -powered knowledge artifacts into Customer Portal. The artifacts also embed Oracle Knowledge's search functionality directly within Customer Portal to deliver intent-based, natural language powered search. Oracle Knowledge search results include relevant excerpts that have a high probability of answering a customer's question based on its intent.

Oracle Knowledge uses natural language processing to understand the intent of each inquiry. Then, using other search enhancement features, such as industry-specific libraries, it finds the best-possible answer. Oracle Knowledge for Customer Portal transforms customers' self-service experience—increases online resolution rates, reduces calls into the contact center, and substantially reduces support costs.

Operational Requirement

Oracle Knowledge for Customer Portal requires the use of browsers with third-party cookies enabled. Some browsers disable third-party cookies by default. You must make sure that Oracle Knowledge for Customer Portal customers ensure that end-users access the Oracle Knowledge functionality by using browsers that have third-party cookies enabled.

Extracting the Installation Files

Extract the following Zip files in any convenient location:

- 1 Unzip the `RightNowOKiConnectArtifacts.zip` file located in your installation directory. The extraction creates two directories, `AgentDesktop` and `CustomerPortal`. For this part of the installation, use only the files in the `CustomerPortal` directory.
- 2 Unzip the file `cp.zip`.
- 3 Follow the installation instructions in [Chapter 2, Adding Oracle Knowledge to Customer Portal](#).

Oracle Knowledge for Customer Portal Components

Oracle Knowledge for Customer Portal contains the following components:

- template
- home page
- Ask a Question page
- supporting files
- Browse page
- custom widget

Oracle Knowledge for Agent Desktop includes the following options:

- The `SearchImmediately` option provides the ability to determine whether a search runs automatically when a user selects the Oracle Knowledge workspace tab.
- The `iConnectProperties` option provides the ability to apply additional incident information to further filter the search results.

Point-to-Point Authentication

In its initial, ready-to-use condition, Oracle Knowledge for Service Cloud integration does not support single-sign-on authentication with Security Assertion Markup Language (SAML) or Lightweight Directory Access Protocol (LDAP)-based systems. However, professional services or your systems integrator may customize it. The ready-to-use integration provides point-to-point authentication between Agent Desktop, Customer Portal, and Oracle Knowledge. By way of point-to-point authentication, a user can sign in to Agent Desktop or Customer Portal and access Oracle Knowledge functionality without having to sign in to each application.

An implementation of the Oracle Knowledge `iAuthenticator` interface enables this functionality. In this implementation, when a user accesses Oracle Knowledge from Agent Desktop, Oracle Knowledge determines whether a console user with the same e-mail address exists in the database. For Customer Portal, Oracle Knowledge determines whether a web user with the same e-mail address exists. If the user does exist, Oracle Knowledge validates that the user is active and that Oracle Knowledge generated the user's authentication token. If the validation passes successfully, the user has permission to access Oracle Knowledge. If the validation does not pass, the user can access only anonymous content.

In all cases, if user records do not exist in Oracle Knowledge, Oracle Knowledge creates user records and assigns them default roles and views. If a user record does exist in Oracle Knowledge, this integration

validates that the user is active in Oracle Knowledge. If the user record already exists in Oracle Knowledge, there is no further update of the user.

Adding Oracle Knowledge to Customer Portal

This section describes the procedures for adding Oracle Knowledge to Customer Portal. It includes steps for editing the template, home page, and Ask a Question page, as well as editing the supporting files, adding a browse page, and adding the custom widgets.

The following placeholder is used in the sample code in this document. Before you begin, be sure you know the equivalent values for your site so you can use them to replace the placeholder. The bold italic text in code examples indicates where you need to add information specific to your site.

<your_site>-This is the URL your customers use to access your organization's customer portal. It resembles `https://your-company-name.custhelp.com/`.

The procedures in this document also assume that you have received the source files necessary for implementing Oracle Knowledge and that they are available for you to copy. When unzipped, the source file contains two folders: `development` (which includes the `views` and `widgets` subfolders) and `assets`.

Editing the Template

Because your changes to the template will be extensive, Oracle recommends that you back up the `standard.php` template found in the reference implementation before making your changes.

The template changes accomplish the following tasks:

- Add a Browse navigation tab to the template to replace the reference implementation's Answer tab.
- Replace the Search field in the template sidebar with code for Oracle Knowledge for Service Cloud searching.

To edit the template:

- 1 Using a WebDAV client, open the `standard.php` file in your site's `/cp/development/views/templates` folder. Save the original file with a new name, for example, `standard_original.php`, and then close it.
- 2 Open `standard.php` to edit as your new standard template.
- 3 Locate the following line of code:

```
<link rel="icon" href="images/favicon.png" type="image/png"/>
```

- 4 Add the following line of code immediately above the code in step 3.

```
<link type="text/css" rel="stylesheet" href="/euf/assets/css/oracleKnowledge_ltr.css">
```

- 5 Remove the Answers tab and Community tab by deleting the following lines of code:

```
<li><rn:widget path="navigation/NavigationTab" label_tab="#rn:msg:ANSWERS_HDG#"
link="/app/answers/list" pages="answers/list, answers/detail, answers/intent"/></li>
<rn:condition config_check="COMMUNITY_ENABLED == true">
<li><rn:widget path="navigation/NavigationTab" label_tab="#rn:msg:COMMUNITY_LBL#"
link="#rn:config:COMMUNITY_HOME_URL:RNW##rn:community_token:?" external="true"/></
li>
</rn:condition>
```

- 6 Add the following code to create a Browse tab to replace the code that you deleted for the Answers tab and Community tab in step 5.

Note: The Browse page referenced in the code has not yet been added to the page set.

```
<li><rn:widget path="navigation/NavigationTab" label_tab="#rn:msg:BROWSE_LBL#" link=
"/app/browse" pages="browse" /></li>
```

- 7 To replace the Search field in the sidebar, locate and delete the following line of code:

```
<rn:widget path="search/SimpleSearch"/>
```

- 8 Add the following code below the code that you located in step 7. Add the information for your site where you see the bold italic text placeholders. Also check that the directories indicated in bold italics match your infocenter file structure.

```
<rn:widget path="oracleKnowledge/SidebarSearch" base_url="http://
infocenterhost:infocenterport/<infocenterappname>/" widget_dir="http://
infocenterhost:infocenterport/<infocenterappname>/apps/infocenter/resources/js/
OKWidgets/" />
```

- 9 Save standard.php.

Adding Widgets for Oracle Knowledge

The source files include files for the following widgets:

Widget	Displays
Browse	information on the Browse page of the Customer Portal
Home	searching and information on the Home page of the Customer Portal
OKDeflectionFormSubmit	information on the Ask a Question page of the Customer Portal
SidebarSearch	searching on the side bar of the Customer Portal

To install the Oracle Knowledge widgets:

- Using the unzipped source file, copy the oracleKnowledge folder from the development/widgets/custom/ source folder, and paste the folder into your Customer Portal file structure at /cp/development/widgets/custom. The file structure in your customer portal should be as follows:

```
/cp/development/widgets/custom/oracleKnowledge/Browse/1.0
/cp/development/widgets/custom/oracleKnowledge/Home/1.0
```

```
/cp/development/widgets/custom/oracleKnowledge/OKDeflectionFormSubmit/1.0
/cp/development/widgets/custom/oracleKnowledge/SidebarSearch/1.0.
```

2 Activate the Oracle Knowledge widgets.

- a Go to `https://<your_site>/ci/admin/versions/manage`.
- b In the left column, locate and select the **oracleKnowledge/Browse** widget.
Custom widgets appear at the top, and the widgets you just created are dimmed to indicate that they are not yet active.
- c Click **Start Using This Version** in the upper right corner of the page.
The widget is now activated and you can use it on any page of your customer portal.
- d Repeat steps b and c for the other widgets:
 - oracleKnowledge/Home
 - oracleKnowledge/OKDeflectionFormSubmit
 - oracleKnowledge/SidebarSearch

For more information about widgets for Oracle Knowledge, see “Getting Started with Widgets”.

Integrating Oracle Knowledge

The following procedures describe how to import the Oracle Knowledge files into your Customer Portal files.

To integrate the files:

- 1 Copy the following CSS file from the source folder `assets/css` to your `/cp/assets/css`.
`oracleKnowledge_ltr.css`— This CSS file is for languages that use left-to-right writing.
- 2 Copy the `oracleKnowledge` folder from the `assets/images` folder of the source files to `/cp/assets/images`. The CSS files require these images for Oracle Knowledge for Service Cloud.
- 3 Edit the Support Home, Browse, and Ask a Question pages as described in the following procedures.

To edit the Support Home page, use the following procedure:

- 1 Using a WebDAV client, open the `home.php` file in the `/cp/development/views/pages` folder and save the original file with a new name, for example, `home_original.php`, and then close it.
- 2 Open the file `home.php` so you can edit it to be your new home page.
- 3 Delete every line of code in the file except the first one:

```
<rn:meta title="#rn:msg:SHP_TITLE_HDG#" template="standard.php" clickstream="home"/>
```

- 4 Add the following code after the first line. Add the information for your site where you see the bold italic text placeholders. Also check that the directories indicated with bold italics match your customer infocenter file structure.

```
<rn:widget path="oracleKnowledge/Home"
base_url="http://infocenterhost:infocenterport/<infocenterappname>/" widget_dir=
"http://infocenterhost:infocenterport/<infocenterappname>/apps/infocenter/
resources/js/OKWidgets/" />
```

5 Save `home.php`.

To add the Browse page, use the following procedure:

- 1 Using a WebDAV client, copy the `browse.php` file from the `development/views/pages` source folder and paste it into `/cp/development/views/pages` in your customer portal file structure.
- 2 Locate the following code and edit it with information for your site.

```
base_url="http://infocenterhost:infocenterport/<infocenterappname>/"
```

- 3 Locate the following code and verify that the directory matches your customer infocenter file structure.

```
widget_dir="http://infocenterhost:infocenterport/<infocenterappname>/apps/  
infocenter/resources/js/OKWidgets/"
```

- 4 Locate the following code and edit it with information for your site.

```
default_channel="FAQ"
```

5 Save `browse.php`.

To edit the Ask a Question page, use the following procedure:

- 1 Using a WebDAV client, open the `ask.php` file in the `/cp/development/views/pages` folder and save the original file with a new name, for example, `ask_original.php`, and then close it.
- 2 Open `ask.php` so you can edit it to be your new Ask a Question page.
- 3 Delete the following lines of code.

```
<rn:widget path="input/FormSubmit" label_button="#rn:msg:CONTINUE_  
ELLIPSIS_CMD#" on_success_url="/app/ask_confirm" error_location=  
"rn_ErrorLocation"/>  
<rn:condition answers_viewed="2" searches_done="1">  
<rn:condition_else/>  
<rn:widget path="input/SmartAssistantDialog"/>  
</rn:condition>
```

- 4 Add the following code to replace the code you deleted in step 3. Add the information for your site where you see the bold italic text placeholders. Also check that the directories indicated with bold italics match your customer portal file structure.

```
<rn:widget path="oracleKnowledge/OKDeflectionFormSubmit"  
label_button="#rn:msg:CONTINUE_ELLIPSIS_CMD#"  
base_url="http://infocenterhost:infocenterport/<infocenterappname>/"  
widget_dir="http://infocenterhost:infocenterport/<infocenterappname>/apps/  
infocenter/resources/js/OKWidgets/" on_success_url="/app/ask_confirm"  
error_location="rn_ErrorLocation" />
```

5 Save `ask.php`.

Deploying Customer Portal

This section contains a brief overview of staging and promoting Customer Portal after modifying it.

To deploy the modified customer portal, use the following procedure:

- 1 Log directly in to the Deploy page on the Customer Portal Administration site by typing `https://<your_site>/ci/admin/deploy/index` in a web browser.
- 2 Click **Stage** on the Deploy page to open the Select Files page.
A list of the files you modified in the development area appears. Verify that the following files are shown and that the Action column for each file contains Copy to Staging:
 - /development/views/pages/ask.php
 - /development/views/pages/browse.php
 - /development/views/pages/home.php
 - /development/views/templates/standard.php
 - /development/widgets/custom/oracleKnowledge/Browse/1.0
 - /development/widgets/custom/oracleKnowledge/Home/1.0
 - /development/widgets/custom/oracleKnowledge/OKDeflectionFormSubmit/1.0
 - /development/widgets/custom/oracleKnowledge/SidebarSearch/1.0
- 3 Click **Next**.
The Select Version Changes page appears.
- 4 Click the drop-down menu for Push All Framework and Widget Version Changes? and select **Yes**.
The Select Configurations window appears.
- 5 Click **Next**.
The Stage page appears.
- 6 Click the **Stage** button, and then click **Stage** on the confirmation window.
When the staging process is complete, a Staging Completed Successfully message appears. Now you can promote your changes to the production site that your customers access.
- 7 Click the **Deploy** tab and select **Promote** on the Deploy page.
The Promote page appears.
- 8 Click the **Promote** button, and then click **Promote** on the confirmation window.
When the Promote process is complete, a Promote Completed Successfully message appears.

Configuring Point-to-Point Authentication

The following procedures explain how to configure point-to-point authentication. For more information, see “Point-to-Point Authentication”.

Updating Authenticator Details in Information Manager

To update Authenticator details in Information Manager:

- 1 Log in to Information Manager as a Super user that the InfoCenter instance repository is pointing to.
- 2 Click **Tools, System, Configure**, and then **Go to Expert Mode**.
- 3 When editing each property:

- Check: Allow administrators to edit value.
 - Uncheck: Encrypt Value.
 - Select: Save to default value.
- 4 Set the values as follows:
 - REMOTE_AUTHENTICATION_CLASS:com.inquiria.services.ldapservices.RightnowSSOauthenticator
 - REMOTE_AUTHENTICATION_ENABLED: true
 - REMOTE_CRM_CHECKMAILFORUSER_ENABLED: true
 - REMOTE_CRM_CHECKROLEANDVIEW_ENABLED: false
 - REMOTE_SSO_ENABLED: true
 - REMOTE_FIELD_BUILDER_CLASS:com.inquiria.services.ldapservices.RightNowFieldBuilder
 - 5 Save the settings.

Updating Point-to-Point Authentication Properties

To update Point-to-Point Authentication Properties in InfoCenter `infocenter.properties`:

- 1 Navigate to the InfoCenter instance directory.
- 2 Open the file `infocenter.properties` located at:
 - WebLogic Instance: `\IM\instances\InfoManager\webapps\infocenter\app\WEB-INF\infocenter.properties`
 - Tomcat instance: `\IM\instances\InfoManager\appserverim\webapps\infocenter\WEB-INF\infocenter.properties`
- 3 Add the following keys into the `infocenter.properties`:
 - `cca_param_rnow=RNOW`
 - `cca_param_cp=CP`
 - `secretkey=test123` **any desired key
 - `maxallowedtimediff=10`

**Secret key is used for authentication between RNOW CP site and IM to be used in SSOToken. Please note that the secret key should match with that of the RNOW CP site for the token to be validated in IM. Secretkey can be a combination of alphanumeric with characters like *, #, = etc

** Maxallowedtimediff is the key for the SSO token expiration in minutes.
- 4 Restart the IM/InfoCenter instance.

Configuring Secretkey in the Customer Portal Site

Use the following steps to configure Point-to-Point Authentication for the Customer Portal site. If the configuration is for a new site, refer to the document to set up the Customer Portal site and then use the following steps.

- 1 Install the latest RNOW installation build, extract the CP site files
- 2 Open the file `okAuthUtil.ini` in the extracted folder (`\CustomerPortal\development\widgets\custom\oracleKnowledge\Authenticate\1.0`) and update the secret key. The secret key value should be same as what is configured in the `infocenter.properties` file of InfoCenter.
- 3 From the downloaded files, open the `standard.php` file under `cp\customer\development\views\templates` and add that line as the first line in the html body as indicated in the following code sample:


```
<body class="yui-skin-sam yui3-skin-sam"><rn:widget path="oracleKnowledge/
Authenticate" base_url="http://infocenterhost:infocenterport/<infocenterappname>/"
widget_dir="http://infocenterhost:infocenterport/<infocenterappname>/apps/
infocenter/resources/js/OKWidgets/" />
<link rel="icon" href="images/favicon.png" type="image/png"/>
</head>
<body class="yui-skin-sam yui3-skin-sam">
```

Important! Here add the following line:

```
<rn:widget path="oracleKnowledge/Authenticate" base_url="http://
infocenterhost:infocenterport/<infocenterappname>/" widget_dir="http://
infocenterhost:infocenterport/<infocenterappname>/apps/infocenter/resources/js/OKWidgets/
" />
<div id="rn_Container" >
<div id="rn_SkipNav"><a href="#rn_MainContent">#rn:msg:SKIP_NAVIGATION_CMD#</a></div>
<div id="rn_Header" role="banner">
<noscript><h1>#rn:msg:SCRIPTING_ENABLED_SITE_MSG#</h1></noscript>
<div id="rn_Logo"><a href="/app/#rn:config:CP_HOME_URL#rn:session#"><span class=
"rn_LogoTitle">#rn:msg:SUPPORT_LBL# <span class=
"rn_LogoTitleMinor">#rn:msg:CENTER_LBL#</span></span></a></div>
```
- 4 Upload the widget inside directory `cp\customer\development\widgets\oracleKnowledge` and `standard.php` (`cp\customer\development\views\templates`) within the Customer Portal site using WebDav.
- 5 Activate and publish the Authenticate widget from the Customer Portal site admin `https://<CP_SITE>/ci/admin/versions/manage`.

Validating the Point-to-Point Authentication

To validate the point-to-point authentication:

- 1 Navigate to the Customer Portal site and create a login.
- 2 Click the Browse tab and open an Information Manager document.
- 3 Check that the profile used in the Customer Portal site is valid and Viewing the document shows up the user information.
- 4 Log in to Information Manager as a console or super user and validate that a new user is created under Web Users with the RNOW CP site userID, Email, FirstName, LastName with Web user privileges.

Adding Oracle Knowledge to Agent Desktop

This process adds the OK Knowledge tab and the LinkedAnswers tab to incident workspaces. This section describes how to add and configure Oracle Knowledge for Agent Desktop in your incident workspaces.

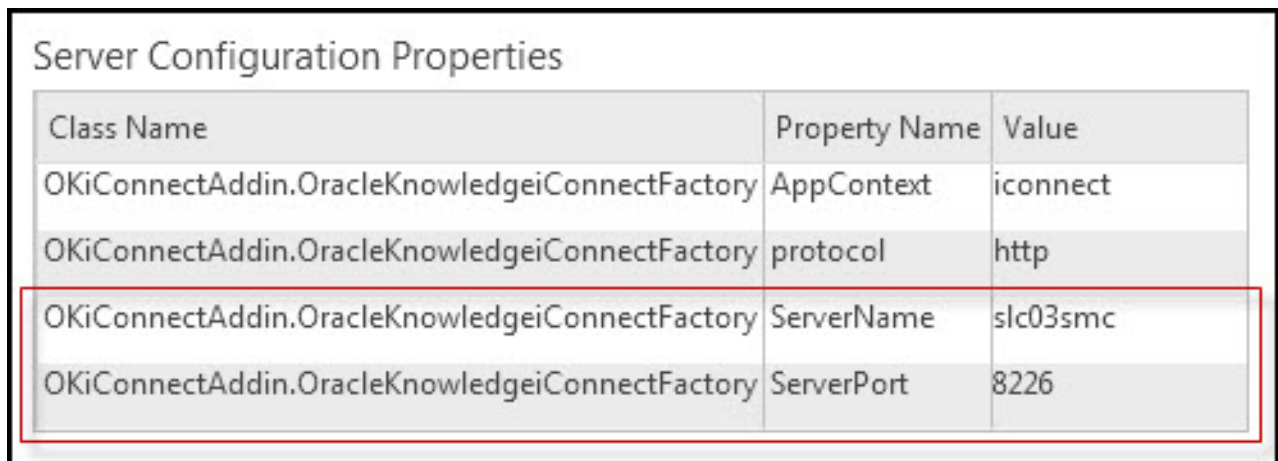
To allow staff members access to the new components, you must configure staff profiles for incident workspaces.

Important! Before you proceed, make sure that you have fulfilled all prerequisites and have run the installation files, as described in “Getting Started with Oracle Knowledge for Service Cloud”.

Installing the Add-In

To grant access to user profiles:

- 1 In the left navigation panel, navigate to **Configuration, Site Configuration**, and then **Add-In Manager**.
- 2 Create a new add-in.
- 3 Select `OKiConnectAddin.zip` and complete the upload steps.
- 4 In the Server Configuration Properties section of the Add-In Manager, set the value of the `ServerName` and `ServerPort` properties to the correct values for your server, as shown in the following figure.



Class Name	Property Name	Value
OKiConnectAddin.OracleKnowledgeiConnectFactory	AppContext	iconnect
OKiConnectAddin.OracleKnowledgeiConnectFactory	protocol	http
OKiConnectAddin.OracleKnowledgeiConnectFactory	ServerName	slc03smc
OKiConnectAddin.OracleKnowledgeiConnectFactory	ServerPort	8226

Granting Access to Applicable User Profiles

- 1 On the Permissions page of the Profiles editor, for every profile that will use the Oracle Knowledge add-in, allow Create, Read, and Personal Notes permissions for the new LinkedAnswers custom object.
- 2 In the Profiles Allowed to Access group of the Add-In Manager, grant access for every profile that will use the Oracle Knowledge add-in. If your site has multiple interfaces, you must grant access to the add-in for each profile and for each interface the profile has access to.

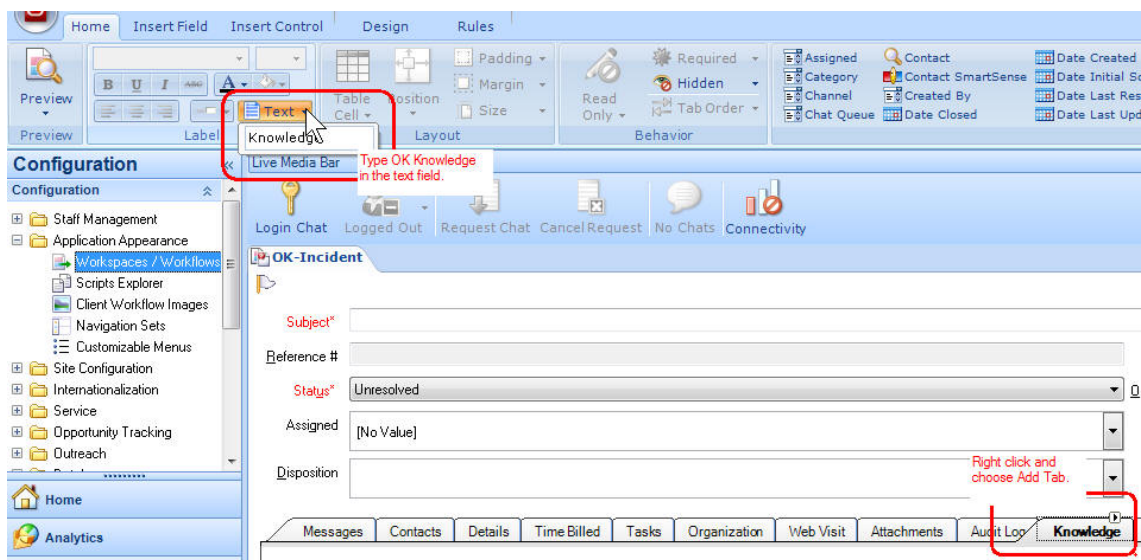
Adding Oracle Knowledge to Incident Workspaces

In a workspace, you can manage and record the actions taken to resolve an incident. Identify an existing incident workspace where you would like to expose the Oracle Knowledge add-in. If you do not have a workspace, you can create a new one.

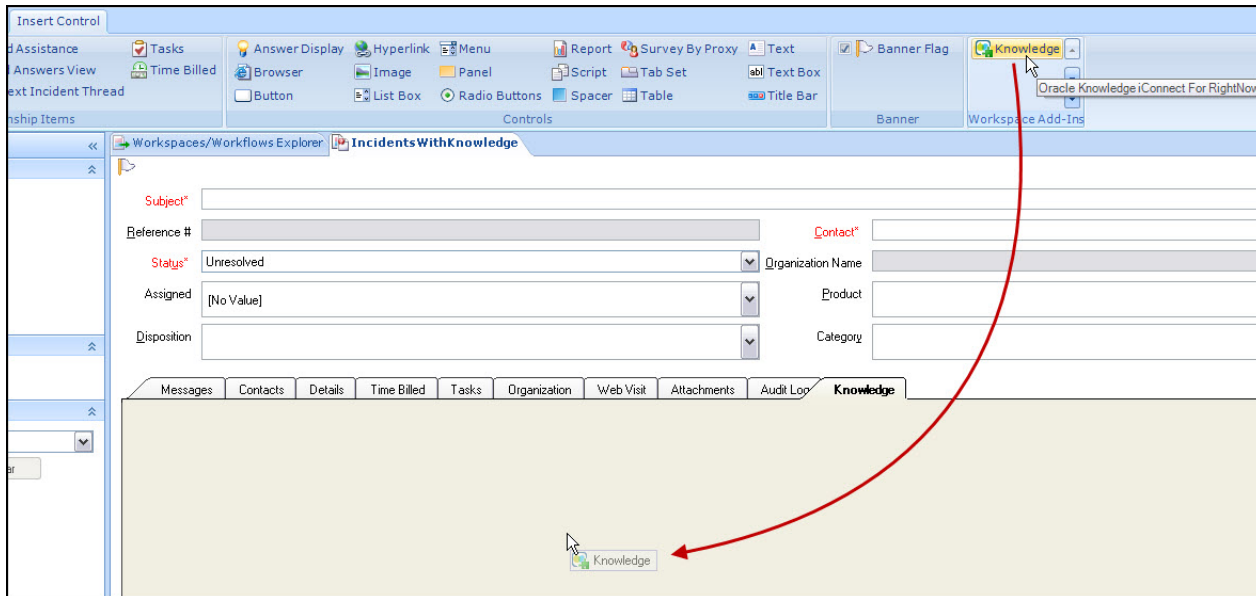
Oracle Knowledge searches on the incident Subject name for suggested solutions and inserts the text of or links to the solutions into the incident workspace. The results may include text and links from demos, FAQs, or blogs, and links to discussion topics.

To add Oracle Knowledge to an incident workspace:

- 1 Add the `OKiConnect AddIn` and `LinkedAnswers` report into the OK – Incident workspace.
- 2 Click the **Design** tab on the toolbar.
- 3 Right click at the row of tabs and select **Add Tab**.
- 4 In the **Text** field on the toolbar ribbon, type **Knowledge** to name the new tab.



- 5 Click the **Insert Control** tab on the toolbar.
- 6 Drag the **Knowledge** icon on the toolbar and drop it into the Knowledge tab space.

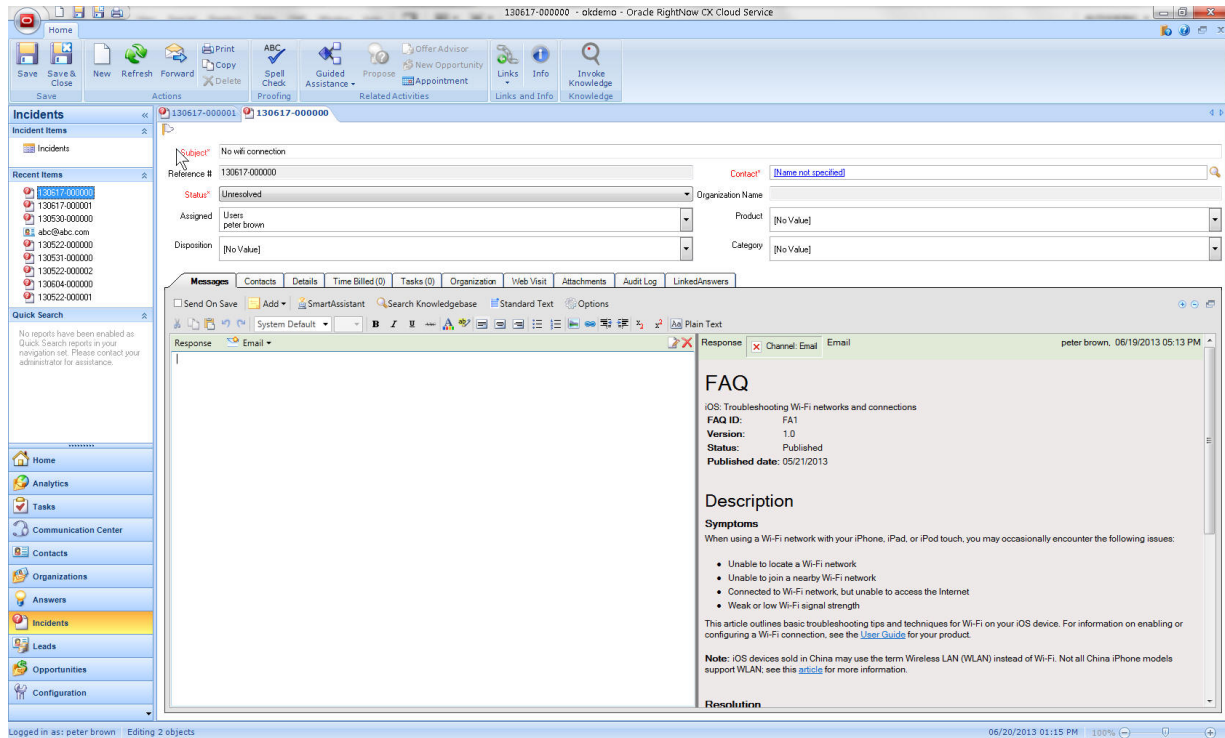


- 7 Click the **Insert Control** tab on the menu bar and then select the **Knowledge** tab.
- 8 Click within the Knowledge tab space where the red text **Oracle Knowledge** is. The toolbar now includes the SearchImmediately and iConnectProperties add-in options. See [Configuring the Add-In Options](#).

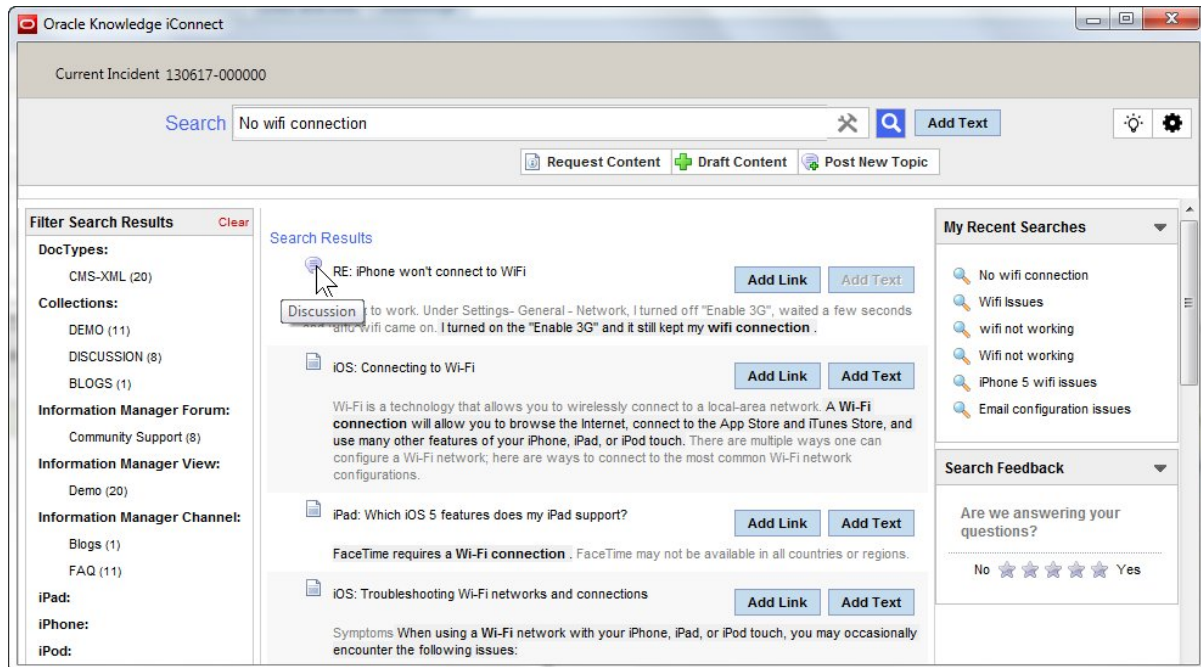
Testing the Integration

To test the integration:

- 1 From the Incidents navigation pane on the left, open a **Recent Item** or search for an incident that you want to add Oracle Knowledge solutions to. To open the Search dialog box, double click the **Incidents** icon in the Incident Items pane. The incident workspace appears in the Messages tab. The history of an existing incident is in the right panel.



- 2 Click the **Invoke Knowledge** button on the menu.
The Oracle Knowledge iConnect search window appears, listing possible solutions.



- 3 You can use the criteria in the Filter Search Results pane to narrow the search, or select an existing search from My Recent Searches.

- 4 Scroll through the search results to find applicable solutions.
- 5 Optionally, agents can also use the following buttons:
 - Request Content: Request additional information.
 - Draft Content: Draft new content immediately.
 - Post New Topic: Choose a question and post it to forums for other agents to use.
- 6 Click **Add Link** to insert a link to the solution or **Add Text** to insert the text of the solution into the incident workspace. You return to the workspace. The link or text that you selected is now in the left workspace panel.

The screenshot displays the Oracle RightNow CX Cloud Service interface. The main window shows an incident workspace for reference # 130617-000000. The incident is assigned to user peter brown and has a status of 'Unresolved'. A search results window is open, displaying a knowledge article titled 'FAQ' with the subject 'iOS: Connecting to the Internet'. The article includes a description, symptoms, and resolution steps. The interface also shows a navigation pane on the left with options like Home, Analytics, Tasks, Communication Center, Contacts, Organizations, Answers, Incidents, Leads, Opportunities, and Configuration. The top toolbar contains various actions like Save, New, Refresh, Forward, Print, Copy, Delete, Spell Check, Guided Assistance, Propose, Appointment, Links, Info, and Invoke Knowledge.

- 7 Save the incident.

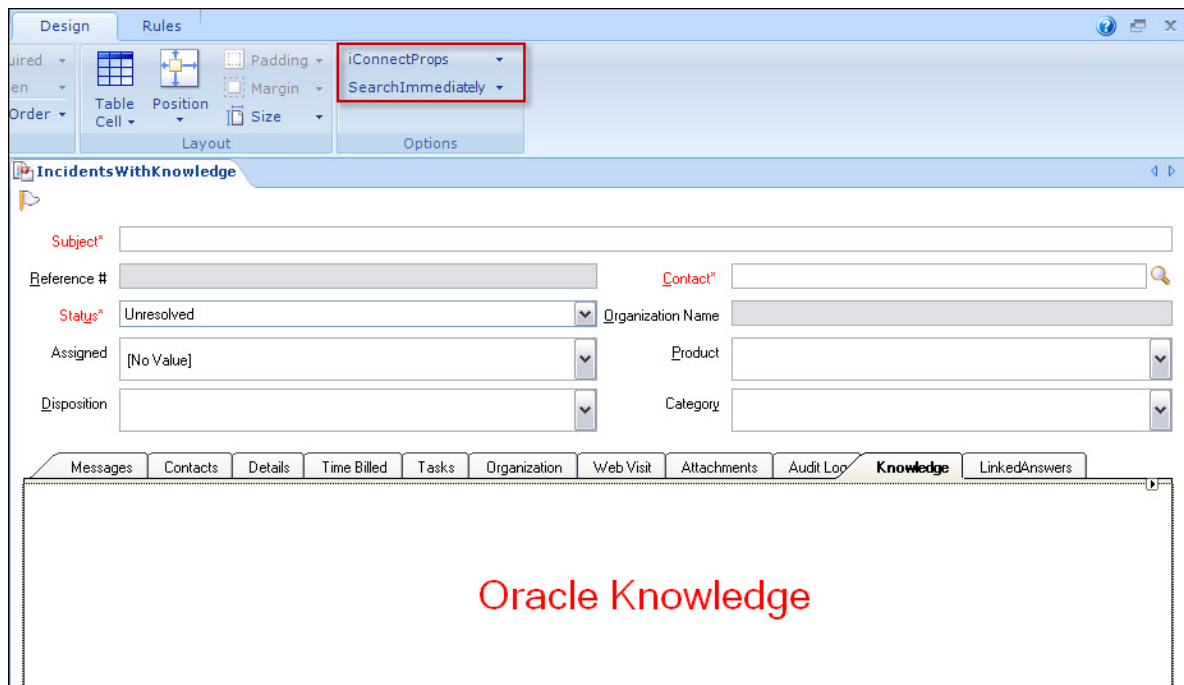
Configuring the Add-In Options

Administrators can configure the Oracle Knowledge options for each incident workspace. The add-in has two configuration options:

- The SearchImmediately option allows users to choose whether or not a search runs automatically. When a user selects the Oracle Knowledge workspace, a search runs on the text entered in the Subject field and a window pops up immediately with the results. If the search does not return results, then the window appears without search results. If the SearchImmediately option is not configured, the search does not run immediately and the user can add more criteria to the search.
- The iConnectProperties option allows users to use additional incident information, such as additional fields in the workspace, to Oracle Knowledge to filter the search results more precisely.

To configure the SearchImmediately and iConnectProperties options:

- 1 In the left navigation pane, click **Configuration, Application Appearance**, and then **Workspaces / Workflows**.
- 2 Open the **OK-Incident** workspace.
- 3 Select the **OK Knowledge** tab and click anywhere in the tab area to select it.
- 4 Click the **Design** tab on the toolbar.
The SearchImmediately and iConnectProperties options appear on the toolbar ribbon.



- 5 Click **SearchImmediately**.
A text box appears.
Note: If you do not want a search to run automatically when you select the Oracle Knowledge workspace tab, you can disable the SearchImmediately option by clearing the text box. To enable the SearchImmediately option, type **true** in the text box.
- 6 Click **iConnectProperties**.
A text box appears.
- 7 The default value `cca_system=RNOW` or a blank value runs a search only on the incident subject. Optionally, you can edit the value in the text box to add incident fields that you want to include as additional search filter criteria.
To add additional filters, add parameters after `cca_system=RNOW` with the pattern `fieldname<#>=$table_name.field` where:

- *Table_name* is the name of the Oracle Knowledge table (also the object in Connect Web Services for SOAP).
- *Field* is the name of the field in the Oracle Knowledge table (or object).

For example, if you want to include the incident threads, product, and category, you would enter the following text in the iConnectProperties option:

```
cca_system=RNOW?fieldname1=$incident.threads&fieldname2=$incident.product&fieldname3=$incident.category
```

- 8 Optionally, you can also pass incident custom fields. For example, if you want to pass the incident custom field with an ID of 3, you would enter the following text in the iConnectProperties option:

```
cca_system=RNOW?fieldname1=$incident.c$3
```

Tip: To find the custom field ID, in the Custom Fields editor hover the cursor over the custom field name.

Note: Custom fields with Text Area or Text Field data types cannot be passed using the iConnectProperties option. Any other incident fields supported by Connect Web Services for SOAP are supported in the iConnectProperties option.

Installing and Configuring Chat for Agent Desktop

The Oracle Knowledge agent chat is an application that customer support agents can use to converse online with customers. This installation adds icons to the Agent Desktop toolbar to log in, indicate availability, request a chat, and cancel a request.

Creating a Workspace for Chat on the Site

After you install the chat version, to create a workspace for the chat:

- 1 Through HMS go to the site control page for your site and click the **Chat Controls** tab.
- 2 Select **bcvipdv01** for the Chat Server. Select your version from the Select Chat Version list.
- 3 Click **ENABLED** and then click **Submit**.
- 4 Open Internet Explorer and log in to the site you created by using user name: administrator. This is the default administrator user account created by RNOW. There is no password for this account.
Note: Microsoft Internet Explorer 9 and later is the only web browser that the Oracle Knowledge for Agent Desktop site is compatible with.
- 5 In the security certificate warning, click **Continue to this website**.
- 6 Create a new workspace for chat and save it as **OK - Chat**.
- 7 Go to **Staff Management Profiles**. Open profile **Q2 Profile** and click **workspaces/workflows**.
- 8 For the chat workspace, browse and select **Ok-Chat** (the workspace you created in step 5).
- 9 Click the **Permissions** tab.
- 10 Upload the file **OKiConnectAddin.zip** for Add-in into Oracle Knowledge for Service Cloud.

- a From the release directory, locate and extract the file `OKiConnectAddin.zip`.
 - b Navigate to **Configuration, Site Configuration**, and then **Add-in Manager**.
 - c Create a new add-in.
 - d Select the file `OKiConnectAddin.zip` and complete the upload steps.
- 11 Complete the iconnect instance details.

Activating iConnect Knowledge in the Chat Workspace

Activate iConnect Knowledge in the chat workspace:

- 1 Navigate to **Configuration, Application Appearance, Workspaces / Workflows**.
- 2 Open the **OK - Chat** workspace.
- 3 Click **Ribbon** to open the Ribbon Designer window.
- 4 Double click **Home**.
- 5 Under **Name**, click **Links and Info**.
- 6 Click **Add Group** to add the group Knowledge.
- 7 Click **OK** and then **Save**.
- 8 Click the **Knowledge** group and then click the **Edit** group.
- 9 Add the **Invoke Knowledge** button and complete the steps.
- 10 Save and then leave the OK - Chat workspace.
- 11 Log out and then log in as an agent.
- 12 On the **Live Media Bar**, click **Login Chat**, select the status **Available**, and then click **Request Chat**.

Updating Authenticator Details

To update Authenticator details in Information Manager:

- 1 Log in to Instant Messenger as a Super user that the iConnect instance repository is pointing to.
- 2 Click **Tools, System, Configure**, and then **Go to Expert Mode**.
- 3 For each property select the following options:
 - a Check **Allow administrators to edit values**.
 - b Un-check **Encrypt Value**.
 - c Select **Save to the default value**.
- 4 Set the following values:
 - `REMOTE_AUTHENTICATION_CLASS`:
`com.inquiria.services.Idapservices.RightnowSSOAuthenticator`
 - `REMOTE_AUTHENTICATION_ENABLED`: `true`

- REMOTE_CRM_CHECKMAILFORUSER_ENABLED: true
- REMOTE_CRM_CHECKROLEANDVIEW_ENABLED: false
- REMOTE_SSO_ENABLED: true
- REMOTE_FIELD_BUILDER_CLASS:com.inquiria.services.Idapservices.RightNowFieldBuilder

5 Save the settings.

For more information, see “Point-to-Point Authentication”.

Configuring SSO Authentication

The procedures in this topic explain how to configure Single-Sign-On (SSO) authentication, so that users can log in only once to access all parts of a system.

The sequence of configuring SSO includes the following:

- Generate the Encrypted Security Key and Encoded key.
- Create a custom key for SSO CUSTOM_CFG_OKOP_ENCRYPT_KEY in Oracle Knowledge for Agent Desktop.
- Update the Configuration Bases in the HMS site to point to the newly added custom file `OkModel.php`.
- Configure Encrypted Security Key for SSO in the Oracle Knowledge for Agent Desktop User profile access.
- Configure Encrypted Security Key for the Customer Portal site in `okAuthUtil.ini` and update the widget directory for SSO in the Oracle Knowledge for Service Cloud Customer Portal site `standard.php`.
- In Information Manager, update Oracle Knowledge for Service Cloud Authenticator details.
- Update the Encrypted Security Key in `iConnect/InfoCenter`, `infocenter.properties`.
- Validate the SSO.

Generating the Encrypted Security Key and Encoded Key

To generate the Encrypted Security Key and Encoded Key:

- 1 Download the latest build. (TRUNK build or the latest release version branched from TRUNK build after April 4,2014.)
- 2 Extract the file `RightNowOKArtifacts.zip`.
- 3 Open the AgentDesktop folder.
- 4 Put the file `OKAESKeyGenerator.exe` under the AgentDesktop folder and double click the file to open it.
- 5 Enter the Secret key that you want to encrypt and the Key used for encryption, as shown in the following figure.

Secret Key to be encrypted: test123

Key to use for encryption: test123

Encrypt

Encrypted Secret Key: YzQyYTVZmVY2Y3NDY1MmFmMDBjN2UyZTEyNThhM2U=

Encoded Key: Njl1ZTUwM2U3Yz03ZDNjMzEz0GE20Tc3NTAzZTVZTc=

- 6 Copy the Encrypted Secret Key and the Encoded Key.

Creating a Custom Key

To create a Custom Key for SSO `CUSTOM_CFG_OKOP_ENCRYPT_KEY` in Oracle Knowledge for Agent Desktop:

- 1 Load the Oracle Knowledge for Agent Desktop.
- 2 Log in as an Administrator user.
- 3 Navigate to **Configuration**, then **Site Configuration**, and then **Configuration Settings**.
- 4 Click **New** and then select a Text Configbase entry.
- 5 Enter the following values:
 - Enter key: **CUSTOM_CFG_OKOP_ENCRYPT_KEY**
 - Maximum length: **100**
 - Paste the Encoded key (generated from “Creating a Custom Key”) **OKAESKeyGenerator.exe** into the **Value** field.
- 6 Save the configuration.

Updating the Configuration Bases in the HMS Site

To update the configuration bases in the HMS site to point to the newly-added `OkModel.php` custom php file:

- 1 Log in to the HMS site and search for the Oracle Knowledge for Service Cloud site.
- 2 Click the **Interface Control** page. (Click the Interface name to take you to the control page.)
- 3 Click the **Config and Message** bases section.
- 4 Under Configuration bases, search for SEC_ADDTL_PHP_WRAPPER_USAGE or SEC_PROVISIONAL_ADDTL_PHP_WRAPPER_USAGE.
- 5 In the **Value** section, enter the following text:

```
ske_buffer_decrypt,cp/customer/development/models/custom/OkModel.php
```
- 6 Submit the changes.

Start Page Configuration Settings CUSTOM_CFG_OKOP_ENCRYPT_KEY

Configuration Entry Information

Key CUSTOM_CFG_OKOP_ENCRYPT_KEY

Data Type Text

Type Site

Required No

Folder Custom

Default Nj11ZTUwM2U3Yzc3ZDNjMzEzOGE2OTc3NTAzZTVjZTc=

Maximum Length 200

Pattern

Values

Configuration Base	Value
Site	Nj11ZTUwM2U3Yzc3ZDNjMzEzOGE2OTc3NTAzZTVjZTc=

Configuring Encrypted Security Key for Agent Desktop

Configure the Encrypted Security Key for SSO in the Agent Desktop User Profile Access. Set up SSO for Agent Desktop, which is already running.

If the configuration is for a new agent, use the following steps while configuring the OKAddIn:

- 1 Log in to Agent Desktop as an administrator.
- 2 Navigate to **Configuration, Site Configuration**, and then **Add-In Manager**.
- 3 If OKiConnectAddin exists, delete it and add the new OKiConnectAddin with the SSO changes.
- 4 After adding the add in, go to **Profile Access**, select the profile you want, and provide iconnect instance details (protocol, context, port, servername) with the Encrypted Security Key generated from the file `OKAESKeyGenerator.exe`.
- 5 Save the configuration.

Configuring Encrypted Security Key for the Customer Portal Site

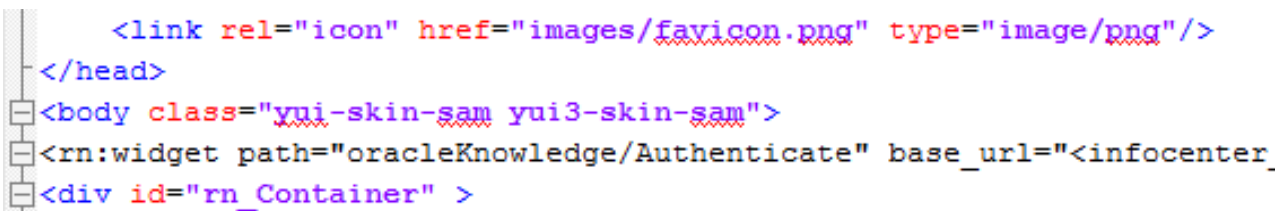
Set up SSO for the Customer Portal site in `okAuthUtil.ini` and update the widget directory for SSO in the RNOW Customer Portal site `standard.php`.

If the configuration is for a new site, use the following steps:

- 1 Install the latest Oracle Knowledge for Service Cloud installation build, and extract the Customer Portal site files.
- 2 Open the file `okAuthUtil.ini` in the extracted folder
(`\CustomerPortal\development\widgets\custom\oracleKnowledge\Authenticate\1.0`)
- 3 Update the Encrypted Security Key generated from the file `OKAESKeyGenerator.exe`.
- 4 From the downloaded files open the file `standard.php` under
(`cp\customer\development\views\templates`) and add the following line as the first line in the HTML body (the line after `<body class="yui-skin-sam yui3-skin-sam">`).

```
<rn:widget path="oracleKnowledge/Authenticate" base_url="<infocenter_url_context>"
widget_dir="<infocenter_widget_directory_url>" />
```

The following figure shows where to place this line.



```
<link rel="icon" href="images/favicon.png" type="image/png"/>
</head>
<body class="yui-skin-sam yui3-skin-sam">
<rn:widget path="oracleKnowledge/Authenticate" base_url="<infocenter_
<div id="rn_Container" >
```

- 5 Upload the widget inside directory `cp\customer\development\widgets\oracleKnowledge` and the file `standard.php` (`cp\customer\development\views\templates`) within the Customer Portal site by using the WebDav tool.
- 6 Activate and publish the Authenticate widget from the Customer Portal site admin (`https://<CP_SITE>/ci/admin/versions/manage`).

Updating RNOW Authenticator Details in Information Manager

To update the RNOW Authenticator Details in Information Manager:

- 1 Log in to Information Manager as a Super user that the iConnect instance repository is pointing to.
- 2 Click **Tools, System, Configure**, and then **Go to Expert Mode**.
- 3 Edit each property:
 - a Check: Allow administrators to edit the value.
 - b Uncheck: Encrypt Value.
 - c Select: Save to the default value.
- 4 Set the values as follows:

- REMOTE_AUTHENTICATION_CLASS:com.inquiria.services.ldapservices.RightnowSSOAuthenticat
or
- REMOTE_AUTHENTICATION_ENABLED: true
- REMOTE_CRM_CHECKMAILFORUSER_ENABLED: true
- REMOTE_CRM_CHECKROLEANDVIEW_ENABLED: false
- REMOTE_SSO_ENABLED: true
- REMOTE_FIELD_BUILDER_CLASS:com.inquiria.services.ldapservices.RightNowFieldBuilder

5 Save the settings.

Updating Encrypted Security Key in iConnect and InfoCenter

To update the Encrypted Security Key in the iConnect and InfoCenter file `infocenter.properties`:

- 1 Go to the Information Manager instance installation path, for example, `c:\Oracle\Knowledge\IM\instances\Infomanager`, and run `setenv.bat/.sh`.
- 2 Run the command `encrypt "secret key"` in windows and `encrypt.sh "secret key"` and enter

Note: The secret key should be the same as the "Secret Key to be encrypted" in the file `OKAESKeyGenerator.exe`.

- 3 Copy the encrypted text.

RNOW Agent Desktop

For the RNOW Agent Desktop site:

- 1 Navigate to the iConnect instance directory.
- 2 Open the `infocenter.properties` located at:
 - **WebLogic:** `\IM\instances\InfoManager\webapps\iconnect\app\WEB-INF\infocenter.properties`
 - **Tomcat:** `\IM\instances\InfoManager\appserverim\webapps\iconnect\WEB-INF\infocenter.properties`
- 3 Add the following keys to `infocenter.properties`:
 - `secretkey=7Dz+BAIrMm95q9wvYaimzXZRVNli7fzuu91Zao261aw=**encrypted text generated from setenv.sh/.bat, encrypt command`
 - `maxallowedtimediff=10`

**Secret key is used for authentication between RNOW and IM to be used in SSO token.

Note: The secret key should match the Secret Key to be encrypted in `OKAESKeyGenerator.exe` for the token to be validated in Information Manager. `secretkey` can be a combination of alphanumeric with characters such as `*`, `#`, `=`, and so on.

** `Maxallowedtimediff` is the key for the SSO token expiration in minutes.

- 4 Restart the Information Manager/iConnect instance.

RNOW Customer Portal

For the RNOW Customer Portal site:

- 1 Navigate to the InfoCenter instance directory.
- 2 Open the file `infocenter.properties` located at:
 - **Weblogic:** `\IM\instances\InfoManager\webapps\infocenter\app\WEB-INF\infocenter.properties`
 - **Tomcat:** `\IM\instances\InfoManager\appserverim\webapps\infocenter\WEB-INF\infocenter.properties`
- 3 Add the following keys to the file `infocenter.properties`:

- `cca_param_rnow=RNOW`
- `cca_param_cp=CP`
- `secretkey=7Dz+BAIrMm95q9wvYaimzXZRVNli7fzUU91Zao26law=**encrypted text generated from setenv.sh/.bat, encrypt command`
- `maxallowedtimediff=10`

**Secret key is used for authentication between RNOW and Information Manager to be used in SSOToken.

Note: The secret key should match with that of the Secret Key to be encrypted in `OKAESKeyGenerator.exe` for the token to be validated in Information Manager. `Secretkey` can be a combination of alphanumeric with characters like `*`, `#`, `=`, and so on.

** `Maxallowedtimediff` is the key for the SSO token expiration in minutes.

- 4 Restart the Information Manager/InfoCenter instance.

Validating the SSO Authentication

To verify that the SSO configuration is valid.

RNOW Agent Desktop

- 1 Log in to Oracle Knowledge for Agent Desktop for a created profile.
- 2 Create an incident and invoke Knowledge (iConnect window).
- 3 Make sure that the profile used in Oracle Knowledge for Agent Desktop is validated and Add Link/Text, Recommend a draft, Post a topic is displayed in the iConnect Window.
- 4 Log in to Information Manager as a console/super user and validate that a new user is created under Console Users with the RNOW Agent userID, Email, FirstName, LastName with Default Administrator privileges.

RNOW Customer Portal Site

- 1 Navigate to the Customer Portal site and create a Login.
- 2 Click the **Browse** tab and open an Information Manager document.
- 3 Make sure that the profile used in the Customer Portal site is valid and the document has the user information.

- 4 Log in to Information Manager as a console or super user and confirm that a new user was created under Web Users with the RNOW CP site userID, Email, FirstName, LastName with Web user privileges.

Using the Customer Chat

Agents use the Chat function to converse directly with customers online. Agents log in to the Chat, select their level of availability, and then request to receive a chat.

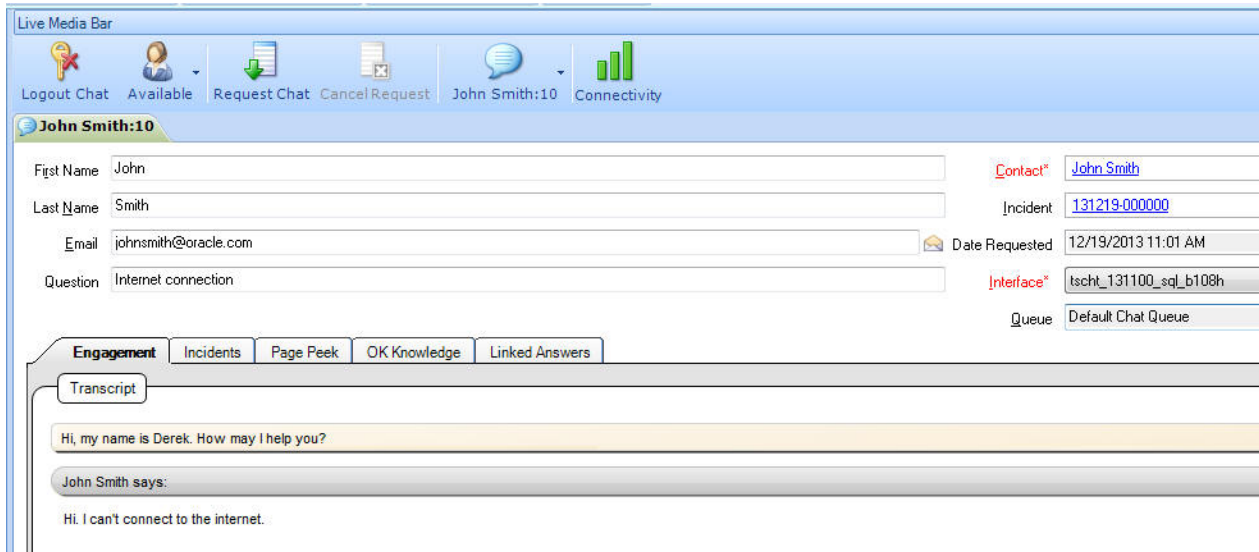
Starting a Chat

To start an agent chat with a customer:

- 1 On the Live Media toolbar, click the **Login Chat** icon.
The icon changes to Logout Chat and the Unqualified icon is activate.
- 2 Click the **Unqualified** icon and select **Available**.
The Request Chat icon is active.
- 3 Click **Request Chat**.
The Incoming Chat window appears, listing details about the customer.
- 4 At the bottom of the Incoming Chat window, click **Accept**.



A window appears, showing details about the customer and the conversation between the customer and the agent in the Engagement tab.



Live Media Bar

Logout Chat Available Request Chat Cancel Request John Smith:10 Connectivity

John Smith:10

First Name John Contact* John Smith
 Last Name Smith Incident 131219-000000
 Email johnsmith@oracle.com Date Requested 12/19/2013 11:01 AM
 Question Internet connection Interface* tscht_131100_sql_b108h
 Queue Default Chat Queue

Engagement Incidents Page Peek OK Knowledge Linked Answers

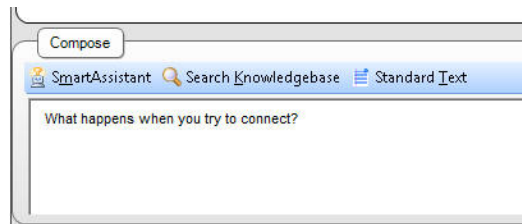
Transcript

Hi, my name is Derek. How may I help you?

John Smith says:

Hi, I can't connect to the internet.

- In the bottom Compose window, type your reply to the customer and click **Send** (or press the **Enter** key).

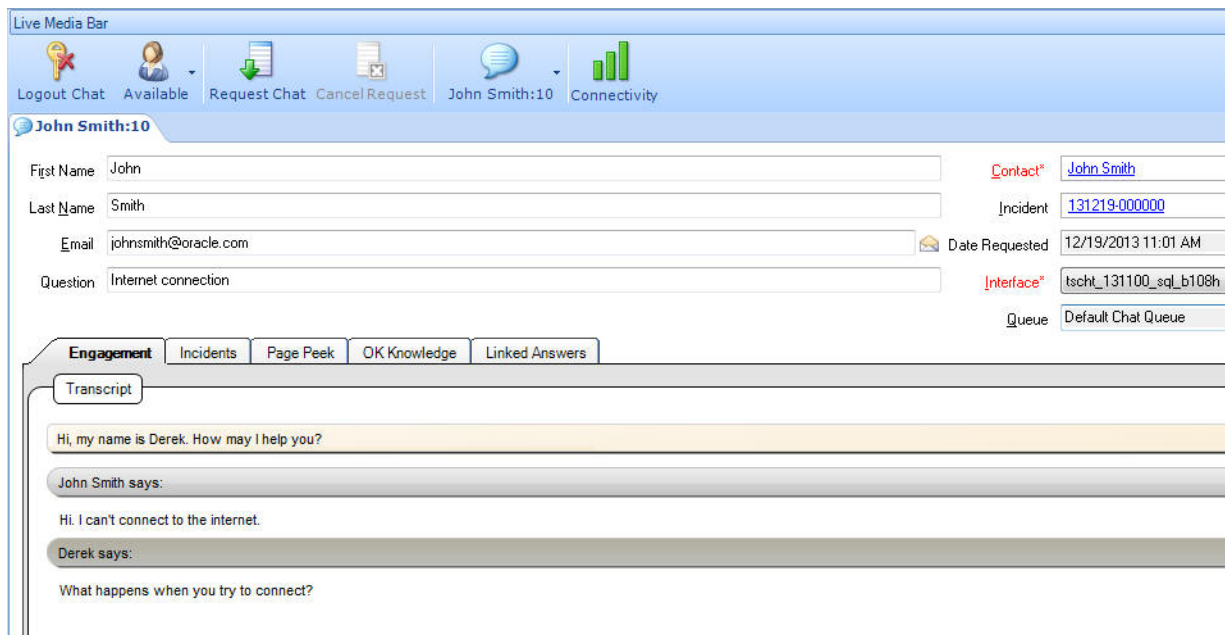


Compose

SmartAssistant Search Knowledgebase Standard Text

What happens when you try to connect?

Your reply appears in the customer's Chat window and in your Transcript window.



Live Media Bar

Logout Chat Available Request Chat Cancel Request John Smith:10 Connectivity

John Smith:10

First Name John Contact* John Smith
 Last Name Smith Incident 131219-000000
 Email johnsmith@oracle.com Date Requested 12/19/2013 11:01 AM
 Question Internet connection Interface* tscht_131100_sql_b108h
 Queue Default Chat Queue

Engagement Incidents Page Peek OK Knowledge Linked Answers

Transcript

Hi, my name is Derek. How may I help you?

John Smith says:

Hi, I can't connect to the internet.

Derek says:

What happens when you try to connect?

- 6 You can send the customer some text or a link to information that will help in solving the problem.