

Oracle AI for Fusion Applications

**How do I use Connectors in AI
Agent Studio?**

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1 Implementation Summary

You can use this playbook to get started with the implementation of connectors in AI Agent Studio.

This section contains the following topics:

- [Implementation Overview](#)
- [What You Will Be Able to Do After Completing the Setup](#)
- [Case Study](#)

Implementation Overview

AI agents need content to deliver accurate, context-aware, and up-to-date information. You can use this playbook to connect your AI agents to various data sources using AI Agent Studio. For information on creating AI agents, see [How do I use AI Agent Studio?](#)

Note: You can use connectors in your AI agents only if Oracle Database 26ai is provisioned on your Oracle Fusion Cloud Application POD. If your AI agents fail to return content from your connectors after completing all the steps in this playbook, raise an SR as you may be missing key infrastructure.

At a high-level, this is what you need to do to set up connectors:

- [Create a Connector for AI Agents](#)
- [Schedule Content Intelligence Synchronization Process](#)
- [Configure Access to Authoring](#)
- [Verify the Synchronized Content in Authoring](#)
- [Create a Tool for Your Connector](#)

This flowchart illustrates these implementation steps and provides information on the related roles and UIs.



What You Will Be Able to Do After Completing the Setup

After you complete the setup described in this guide, your AI agents should be able to access content from different data sources such as SharePoint, web pages, and custom content you maintain in Content Intelligence.

Case Study

In this playbook, a case study is used to illustrate the connectors workflow. The case study is based on a fictitious company named Vision Corp., a global high-tech company that sells laptop and multiple server product lines. Vision Corp. would like to create AI agents to answer customer queries using the content in their data sources such as SharePoint, web pages, and custom content.

In this case study, John Allens, an administrator at Vision Corp. performs the setup tasks. John has the following job roles:

- IT Security Manager
- Knowledge Author

John may need additional roles apart from the roles listed here. For more information on AI Agent Studio specific requirements, see [Access Requirements for AI Agent Studio](#).

2 Supported Content Sources

AI Agent Studio provides the following connectors:

- **SharePoint Connector:** Provides access to your files in Microsoft SharePoint.
- **Web Crawler Connector:** Provides access to the pages of a website.
- **Custom Content Source Connector:** Provides a content type of your design.

SharePoint Connector

The SharePoint Connector enables AI agents to securely discover, retrieve, summarize, and act on files stored across SharePoint sites.

Key Capabilities

It provides governed, real-time access to enterprise knowledge, protected by Content Intelligence security models.

- Secure, permission-aware content access
- Natural-language search and semantic retrieval
- Read and sync content to hybrid search index
- Support for multisite architectures

Web Crawler Connector

The Web Crawler Connector enables autonomous discovery, retrieval, and structured extraction of web content.

Key Capabilities

The web crawler navigates websites, follow links, respect crawl policies, and transform unstructured web data into machine-ready formats for downstream reasoning and automation. AI agents can use content ingested by the web crawler for RAG-type agents.

- Autonomous crawling
- Configurable scope control (domains, paths, depth, frequency)
- Intelligent content extraction (HTML, PDFs, etc.)
- Change detection and incremental updates
- Compliance-aware crawling (robots.txt, sitemap, rate limiting)
- Output normalization to text embeddings
- Enforce content visibility with Content Intelligence security models

Technical Details

- Designate content crawl via sitemap or starting URL and specify depth of crawl
- Supports basic form authentication

- Supports JavaScript navigation

Custom Content Source Connector

It provides a way to store and maintain content for use in AI agents.

Key Capabilities

Custom content sources provide a flexible way for users to define their own content schema and integrate business-specific data into AI agent workflows. These sources start empty and are designed to be populated dynamically through agent-driven (agentic) flows or direct human effort. AI agents can create, update, retrieve, or delete content programmatically as part of their automated processes.

This approach allows organizations to build tailored repositories, such as custom knowledge bases or data stores, directly from within AI workflows, ensuring content remains current and aligned with real-time operational needs.

- **Custom Schema:** Design content structures tailored to your needs, defining specific fields and metadata for any type of information.
- **Life Cycle Management:** Set start, review, and end dates to control when content becomes active, ensure regular updates, and retire outdated information.
- **Visibility and Security:** Manage access with robust permissions, ensuring only authorized users can view or modify content, supporting enterprise compliance.
- **Lexical and Semantic Search:** Quickly find information using keyword (lexical) or context-aware (semantic) search, enabling smarter and more relevant results in workflows.

Business Benefits and Use Cases

- **Flexible Content Storage:** Easily store and organize a variety of business information such as policy documents, historical records, or notes using custom templates and an optional user-friendly interface.
- **Tailored Insights:** Leverage business-specific data models for more relevant and actionable AI responses.
- **Improved Productivity:** Enable agents to access, update, and automate content management directly within workflows, reducing manual effort.
- **Enhanced Compliance:** Control access, manage life cycles, and maintain content accuracy for regulatory and operational requirements.
- **Faster Decision-Making:** Advanced search (lexical and semantic) helps surface critical information quickly.

3 Create a Connector for AI Agents

The following topics provide instructions for creating connectors:

- [Create a SharePoint Connector](#)
- [Create a Web Crawler Connector](#)
- [Create a Custom Content Source Connector](#)

Create a SharePoint Connector

In this case study, John Allens, an administrator at Vision Corp., creates a SharePoint connector as follows:

Note: You need to register Fusion as a new application in your Microsoft Entra ID platform. The connector connects to SharePoint APIs via OAuth 2.0 and needs access to read the files. Make sure you note down the following when you register the application:

- **clientKey:** The client key.
- **clientCert:** The client certificate.
- **SharePoint Application Client ID:** The GUID.

You will also need to collect the following information from your SharePoint site:

- **SharePoint Tenant ID:** The GUID that can be found on your Entra overview page.
- **Site Name:** The name visible in your SharePoint URL immediately after `/sites/`.

To create a SharePoint connector you need to:

1. Go to **Tools > AI Agent Studio**.
2. Click the **Credentials** tab.
3. Click the **Connectors** tab.
4. Click **Add Connector**.
5. Search for **SharepointO365** and click **+**.
6. For **Name**, enter a name of your choice. For example, Vision SharePoint Connector.
7. For the **Code**, retain the autogenerated connector code. For example, VISION_SHAREPOINT_CONNECTOR.

Note: Make a note of the connector code. You will need to provide this code when you define a Data Security Policy for a role.

8. Select a **Family**. For example, CX.
9. Select a **Product**. For example, Service.

10. For **Description**, enter a description. For example, Use this documentation stored in SharePoint to answer questions.
11. For **Article ID Prefix**, provide a prefix. For example, VSP.
12. For **User Groups**, select **Content Intelligence Users**.

User groups enable you to control who can see which content in the Content Intelligence knowledge base. Users assigned to a user group can only access the content targeted for that user group. The predefined user groups help in segregating content that should only be viewed by users within the organization. You can create custom user groups to segment content for additional audiences. For more information, see [How do I assign users to a user group in Knowledge?](#)

13. In the **Authentication** section, configure the **Client Key** and the **Client Certificate**.
14. Set up the fields in the **SharePoint Configuration** section.
15. Select the **Start From Root Folder** checkbox if you want to process the files in the root folder and its sub-folders. Otherwise, identify the folders you want to include. Your SharePoint site may contain a lot of files. Make sure that you only specify the folders that you want to sync.

Tip: Select a folder with less number of files for initial testing. You can always add more folders later.

16. Click **Create**.

The "Vision SharePoint Connector" content type is created, and it appears under the **Connectors** tab.

Create a Web Crawler Connector

Next, John Allens creates a Web Crawler connector as follows:

1. Go to **Tools > AI Agent Studio**.
2. Click the **Credentials** tab.
3. Click the **Connectors** tab.
4. Click **Add Connector**.
5. Search for **WebCrawler** and click **+**.
6. For **Name**, enter a name of your choice. For example, Vision Web Connector.
7. For the **Code**, retain the autogenerated connector code. For example, VISION_WEB_CONNECTOR.

Note: Make a note of the connector code. You will need to provide this code when you define a Data Security Policy for a role.

8. Select a **Family**. For example, CX.
9. Select a **Product**. For example, Service.
10. For **Description**, enter a description. For example, Use these web pages to answer questions.
11. For the **Article ID Prefix**, provide a prefix. For example, VWEB.
12. In the **Configure** section, provide the **Starting URL** and the **Crawl Depth**.

Crawl depth is the page depth from the starting URL up to which you would like the web crawler to process the pages. For example, any child page of the starting web page has a depth value of 2. If you set the crawl depth to 2, it will crawl the starting point URL and all its direct child pages/links.

13. Configure other fields as required and click **Create**.
14. For **User Groups**, select **Content Intelligence Users**.

User groups enable you to control who can see which content in the Content Intelligence knowledge base. Users assigned to a user group can only access the content targeted for that user group. The predefined user

groups help in segregating content that should only be viewed by users within the organization. You can create custom user groups to segment content for additional audiences. For more information, see [How do I assign users to a user group in Knowledge?](#)

15. Click **Create**.

The "Vision Web Connector" content type is created, and it appears under the **Connectors** tab.

Create a Custom Content Source Connector

Next, John Allens creates a custom content source connector by following these steps:

1. Go to **Tools > AI Agent Studio**.
2. Click the **Credentials** tab.
3. Click the **Connectors** tab.
4. Click **Add Connector**.
5. Search for **Custom Content Source** and click **+**.
6. In the **Details** section:
 - a. For **Name**, enter a name of your choice. For example, Customer Appreciation Events.
 - b. For **Description**, enter a description. For example, Use these articles to answer questions.
 - c. For the **Reference Key**, retain the autogenerated key or enter a unique key of your choice. For example, CUSTOMER_APPRECIATION_EVENTS.
Note: Make a note of the reference key. You will need to provide this reference key when you define a Data Security Policy for a role.
 - d. For the Article ID Prefix, provide a prefix. For example, VCC.
Note: The application automatically prefixes this prefix ID to the article ID, when it creates an article of this content type. For example, an article of this content type will have an article ID such as VCC37
 - e. Select a **Family**. For example, CX.
 - f. Select a **Product**. For example, Service.
7. In the **Scripting** section, the **Allow unrestricted JavaScript and HTML** option is a security feature that you can use to block any HTML/CSS content in the rich text area fields of your articles. Enable this option only if you want to allow HTML/CSS content in your rich text area fields.
8. In the **Content Schema** section:
 - a. Click the edit pencil icon next to the **Title** field.
 - b. For **Description**, enter a description. For example, A short summary of the contents of the article.
 - c. Click **Update**.
 - d. Add the following fields:
 - **Body**
 - a. Click the **+** icon to add another field for your content type.
 - b. For **Name**, enter a name of your choice. For example, Body.
 - c. For **Description**, enter a description. For example, The content of the article.
 - d. For the **Reference Key**, retain the autogenerated key. For example, BODY.
 - e. For **Field Type**, select Full Rich Text Area.
 - f. Under **Attribute Options**, ensure that **Searchable** is selected.
 - g. Click **Add**.

- **Event Date**
 - a. Click the **+** icon to add another field for your content type.
 - b. For **Name**, enter a name of your choice. For example, Event Date.
 - c. For **Description**, enter a description. For example, The event date for the customer appreciation event.
 - d. For the **Reference Key**, retain the autogenerated key. For example, EVENT_DATE.
 - e. For **Field Type**, select Full Rich Text Area.
 - f. Under **Attribute Options**, ensure that **Searchable** is selected.
 - g. Click **Add**.

9. Click **Create**.

The "Customer Appreciation Events" content type is created, and it appears under the **Connectors** tab.

4 Schedule Content Intelligence Synchronization Process

You must schedule the **Content Intelligence SharePoint Connector** job to run at regular intervals so that the latest data is available for use in AI agents.

When you run this job:

- For SharePoint connectors: This job copies the files from SharePoint into articles as attachments.
- For WebCrawl connectors: This job crawls the web site and adds the web pages to the search index.

Note: You don't need to run this job for your custom content source connectors.

To run this job:

1. Log in as an administrator.
2. Go to **Tools > Scheduled Processes**.
3. Click **Schedule New Process**.
4. In the Schedule New Process dialog box, select **Job** as the process type.
5. In the **Name** field, type "Content Intelligence SharePoint Connector Job" and press Enter.
6. Click **OK**.
7. Click **Process Options**, choose the options you want, and click **OK** to return to the Process Details page.
8. Click **Advanced** and for **Run** select **Using a schedule**.
9. Set the following frequency:
 - Frequency: Daily
 - Days Between Runs: 1
 - Start Date
 - End Date
10. Click **Submit**.

Note: This job can take a lot of time to complete depending on the number of files in SharePoint or the number of pages in a WebCrawl.

Check the Process Log

Once the **Content Intelligence SharePoint Connector** job has completed, you can check the process details by accessing the log and output attachment. For each SharePoint connector, the log lists the number of files that succeeded.

Some of the SharePoint files don't get added as attachments to an article, because they're constrained by the rules of attachments defined for articles, such as:

- An article can have attachments with a maximum file size of 100 MB.

- Only supported file extensions are allowed for attachments.

To allow additional file types as attachments:

1. Log in as an administrator.
2. Select **Setup and Maintenance**.
3. From the **Setup** menu, select the **Service** offering.
4. Select the **Knowledge Management** functional area and click **Manage Knowledge Files and Images**.
5. In the **File Extensions Allowed** text box, add the file extensions you want to allow.
6. Click **Save**.

5 Configure Access to Authoring

A user may need access to authoring in one of these circumstances:

- You are using a custom content source. You may want to give some users access to Authoring so they can perform manual actions on your content.
- You are using a SharePoint or Web Crawler connector. Administrators can do some troubleshooting related to the SharePoint and Web Crawler connectors in Authoring. Also, for these connectors, access to Authoring gives a user the ability to alter the security of content as exposed via these connectors.

You need to provide access to these users by adding the following data security policies to their user role:

- Data security policies for the department in which the content types were created
- Data security policies for the content types related to connectors

These data security policies are sufficient if the user is already an AI Agent Studio user. If not, then the user will also need the Knowledge Authoring duty role. For more information, refer [Create a Role for Custom Knowledge Authors](#).

6 Verify the Synchronized Content in Authoring

Before you verify the synchronized content in the Authoring UI:

- Ensure that the **Content Intelligence SharePoint Connector** job has completed. This job can take a lot of time to complete depending on the number of files in SharePoint or the number of pages in a WebCrawl.
- Ensure that your administrator has provided you access to Authoring.

To verify the content using Authoring UI:

1. Create the URL for the Authoring UI for the connector you want to verify. Here's the URL syntax:

```
https://<fusion_instance>/fscmUI/redwood/knowledgeauthoring/main?contentType=<connector_code>
```

Where <connector_code> is the:

- Connector code for Sharepoint and WebCrawl
- Reference key for custom content

For example, John can use the following URLs for the connectors he created:

- For the SharePoint connector:

```
https://<fusion_instance>/fscmUI/redwood/knowledgeauthoring/main?  
contentType=VISION_SHAREPOINT_CONNECTOR
```

- For the WebCrawl connector:

```
https://<fusion_instance>/fscmUI/redwood/knowledgeauthoring/main?contentType=VISION_WEB_CONNECTOR
```

- For the custom content type connector:

```
https://<fusion_instance>/fscmUI/redwood/knowledgeauthoring/main?  
contentType=CUSTOMER_APPRECIATION_EVENTS
```

2. Open the required URL in a web browser.

3. Verify the content:

- For SharePoint connectors:
 - An article is created for each SharePoint file.
 - The SharePoint file is added to the article as an attachment.
 - The article lists the SharePoint file name, SharePoint Unique Identifier, SharePoint URL, and the SharePoint file size.
- For WebCrawl connectors:
 - An article is created for each web page.
 - The content of each web page is added to the search index.
 - The content of the page doesn't appear in the article.
- For Custom Content Source connectors:
 - You don't need to run the **Content Intelligence SharePoint Connector** job.
 - Authors need to create and manage articles.
 - You can import content into articles using REST APIs or generate them from AI Agent Studio using a Business Object configured to use the `/v2/articles` APIs.

- You can work with these articles the same way you work with the articles created in Knowledge Management. You can assign user groups to these articles, but you can't assign products, categories, or business units.

For more information on Knowledge Management, refer:

- *Implementing Knowledge Management*
- *Implementing Knowledge Management with the Redwood User Experience*
- *Using Knowledge Management*
- *Using Knowledge Management in the Redwood User Experience*
- *REST API for Knowledge Management with the Redwood User Experience*

Note: The articles created by the **Content Intelligence SharePoint Connector** job are in **Live** status. Articles in **Live** status are available to your AI agents. If an article should not be available to your AI agents, you must unpublish the article in the Authoring UI.

7 Create a Tool for Your Connector

Now that you've created and verified the connectors for your data sources, you can use these connectors in your AI agent by creating a tool for each of your connectors and adding the tools to your AI agent team.

To create a tool for your connector:

1. Go to **Tools > AI Agent Studio**.
2. Click the **Tools** tab.
3. Click **Add**.
4. For **Tool Type**, select **Connector**.
5. For **Tool Name**, enter a name of your choice. For example, Vision SharePoint Tool.
6. For the **Tool Code**, retain the autogenerated key. For example, VISION_SHAREPOINT_TOOL.
7. Select a **Family**. For example, CX.
8. Select a **Product**. For example, Service.
9. For **Description**, enter a description. For example, Use this tool to answer questions using SharePoint content.
10. In the **Connectors** section, click **Add**.
11. Search for your connector, for example "Vision SharePoint Connector", and click **Add**.
12. In the **Filters** section, add the required filters to extract relevant content. Filters specified here will be applied to every search performed.
13. Click **Create**.

8 Congratulations

Congratulations! Your connector tool now appears in the Tools tab in AI Agent Studio, and you can select it when creating AI agents, nodes, or agent teams.

For information on configuring AI agents using AI Agent Studio, see [How do I use AI Agent Studio?](#)

