Oracle® WebCenter

Administrator's Guide for Siebel Application Adapter

11*g* Release 1 (11.1.1)

E17045-02

November 2011

ORACLE®

Oracle WebCenter Administrator's Guide for Siebel Application Adapter, 11*g* Release 1 (11.1.1)

E17045-02

Primary Author: Sarah Howland, Bruce Silver

Contributor: Kevin de Smidt, Jason Schindhelm, Sreekanth Chintala, Rama Vijjapurapu.

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Preface

The *Oracle WebCenter Administrator's Guide for Siebel Application Adapter* describes Oracle Siebel solution configurations for Oracle WebCenter systems.

Audience

This document is intended for administrators configuring integration solutions between Oracle Siebel and Oracle WebCenter systems.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Related Documents

For more information, see the *Oracle WebCenter User's Guide for Siebel Application Adapter*.

Conventions

The following text conventions are used in this document:

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

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Overview

This chapter covers the following topics:

1.1 About This Guide

This guide describes how to configure the Siebel Adapter for Oracle WebCenter. It includes the following sections:

- Chapter 1, "Overview," lists supported Siebel entities and describes attachment options, authentication, and document security.

- Chapter 2, "Configuring the Adapter," lists system requirements and describes how to configure Oracle Content Server and Siebel for adapter use. It also describes optional configuration, such as scanning via Oracle Distributed Document Capture, passing additional metadata parameters from Siebel to Content Server, and customizing the adapter IFrame display.

- Appendix A, "Siebel Object Locking," lists Siebel objects locked during adapter configuration and instructions for activating or deactivating them.

- Appendix B, "Configuring Additional Siebel Objects," lists instructions for configuring additional objects.

1.2 About the Adapter

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

1.3 Automatically Configured Siebel Entities

The Siebel Adapter for WebCenter provides a Siebel archive (SIF) file that automatically configures the following Siebel entities:

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

- Lead

- Group

- Group Suspect

See Section 2.3, "Configuring the Adapter for Siebel" for detailed configuration information.

Note: Additional Siebel entities can be configured for use with the Siebel Adapter for WebCenter by following the instructions in Section B, "Configuring Additional Siebel Objects."

1.4 System Architecture

Figure 1–1 illustrates the IFrame configuration for the Siebel adapter.

Figure 1–1   System Architecture for IFrame Configuration for Siebel Adapter
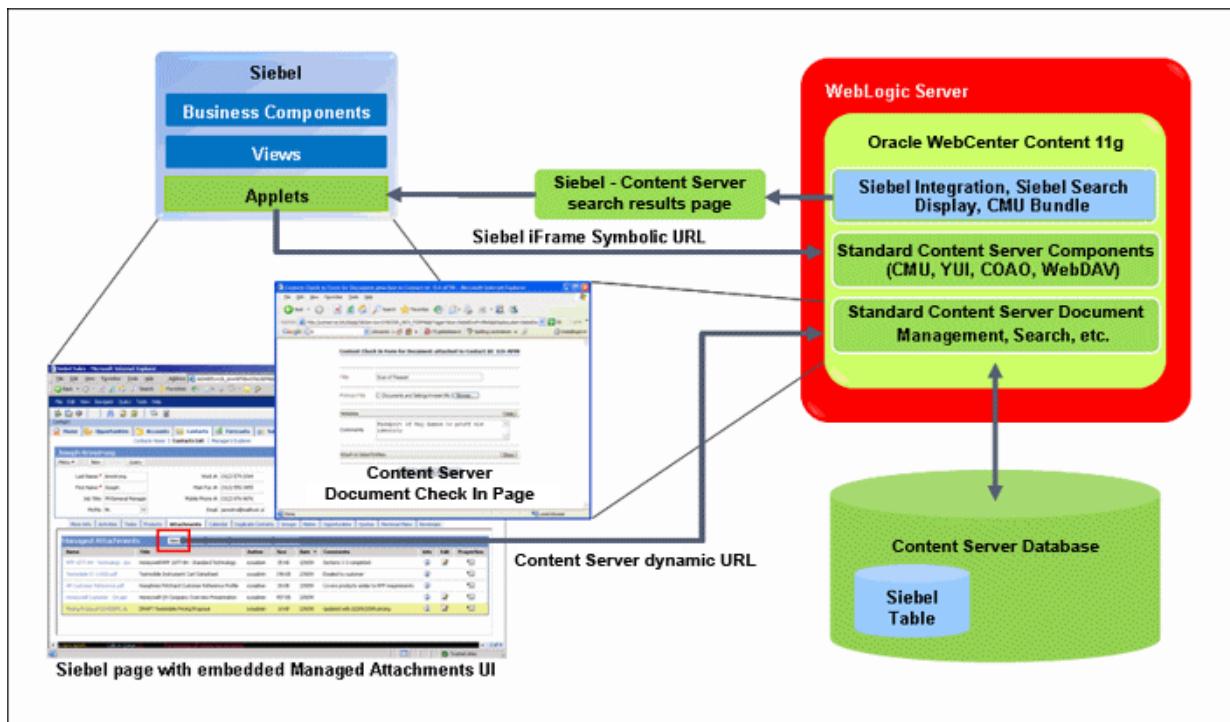
1.5 Managed Attachments Options

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

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

- Open documents in their native application or Web-viewable format

- Check in new documents to Content Server and attach them to the selected Siebel entity

- Detach documents from a Siebel entity

- Refresh the IFrame's list of attachments

- Select and order fields for display in the attachments IFrame

- Search Content Server using advanced search options

- View an attached document's information

- Check out documents, locking them to changes by other users

- Modify a document's metadata values

- Scan and import documents using Oracle Distributed Document Capture, attaching them to a selected Siebel entity

For details about how users work with Content Server documents in a Siebel application, see the *Oracle WebCenter User's Guide for Oracle's Siebel Adapter*.

1.6 User IFrame Authentication

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

- Content Server configured for Oracle Single Sign-On: If Siebel is not configured for single sign-on, the Content Server single sign-on login prompt is displayed. (If Siebel is configured for single sign-on, the user has been authenticated, so no login prompt is displayed.)

- Content Server *not* configured for Oracle Single Sign-On: The Content Server login prompt is displayed, regardless of the selected Siebel authentication model.

1.7 Document Security

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

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Configuring the Adapter

This section covers the following topics:

2.1 System Requirements

The Siebel Adapter for WebCenter requires the following:

The adapter is composed of optional solutions installed over a base configuration of AXF, Imaging, and Content Server files standard to adapters that use AXF functionality. General requirements for the adapter are listed in this section, and supported configuration and certification information is available at:

- Siebel SIA or SEA. The Siebel Web Client is also required. Supported configuration and certification information is available at:

  http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html

- Oracle WebCenter Content 11*g* Release 1 (11.1.1 or higher).

- If implementing scanning functionality, Oracle Distributed Document Capture Release 10.1.3.5.1 or later, including the Oracle UCM 11g Commit Driver,which is provided for installation in this release. The Oracle UCM 11g Commit Driver is required to commit documents from Oracle Distributed Document Capture to Oracle WebCenter Content Server 11g.

- Supported browser versions for the Siebel Adapter include Internet Explorer versions 7.x and 8.x.

- The Siebel Adapter supports the following Content Server search engines. For more information, see Section 2.3.4, "Configure the IFrame URL in the Siebel Web Client."

  – Metadata Only Search

  – Database – Full Text Search

– Oracle Text – Full Text Search

2.2 Configuring the Adapter for Content Server

The Content Server configuration procedures are detailed in the following sections:

- Section 2.2.1, "Verify Required Content Server Components"
- Section 2.2.2, "Upload and Import the Configuration Migration Utility Bundle"
- Section 2.2.3, "Enable the Siebel Adapter Content Server Components"
- Section 2.2.4, "Set the Configuration Variables"

2.2.1 Verify Required Content Server Components

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

1. Log in to Content Server as an administrator.

2. Click the **Configuration for [Instance]** link in the Content Server Administration tray.

3. In the Features And Components section, click **Enabled Component Details**.

4. From the details shown, verify that the following components are enabled. If a component is not listed, enable it.

   - CheckoutAndOpenInNative
   - ConfigMigrationUtility
   - CoreWebdav
   - YahooUserInterfaceLibrary
   - IFrameComponent

2.2.2 Upload and Import the Configuration Migration Utility Bundle

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

1. Log back in to Content Server as an administrator.

2. In Content Server, open the Config Migration Admin folder in the Content Server Administration tray, and click the **Upload Bundle** link.

3. On the Upload Configuration Bundle page, click **Browse**.

4. Select the **SiebelAdapterCMUBundle.zip** file, located in the following folder:

   ECM_ORACLE_HOME/ucm/Distribution/SiebelEcmIntegration

5. Select the **Force overwrite** field.

6. Click **Upload**.

7. On the Configuration Bundles Page, select the **SiebelIntegrationCmuBundle** link. On the Configuration Migration Administration page, select the **Overwrites Duplicates** field. Select **Preview** from the item's Actions menu.

8. On the Import Preview page, select **Import** from the Actions field. (Note that you can ignore messages about skipped dependencies.)

9. Restart Content Server.

2.2.3 Enable the Siebel Adapter Content Server Components

The following Content Server components are provided with the adapter:

Table 2–1   Content Server Components Provided in Siebel Adapter

Content Server Component	Required	Description
SiebelEcmIntegration	Yes	This component provides IFrame functionality.
SiebelFilter	Optional	This component is an optional part of the Siebel Adapter for Oracle WebCenter Content. It enables filtering of the attachments list based on metadata such as Document Type, Author and Security Group.
SiebelIntegrationSearchDisplay	Yes	This component provides searching and IFrame functionality.
SiebelSearchExtension	Optional	This component determines whether documents not yet released are displayed in the attachments list. ■ If enabled, all documents in the system are displayed, including those waiting to be indexed or in workflow. When users hover their cursor over an unreleased document, no underline is displayed and the item cannot be selected. ■ If not enabled, only released documents are displayed. **Note:** This feature is available only when Metadata Only Search is used on the Content Server.
SiebelSearchExtraParams	Optional	This component enables passing Siebel metadata values to Content Server through the New or Scan buttons. For instructions, see Section 2.5, "Passing Extra Metadata Parameters From Siebel to Content Server." Specify parameters to pass as configuration variables, as described in Section 2.2.4, "Set the Configuration Variables."

Follow these steps to enable the components using Component Manager.

1. Log in to Content Server as an administrator.

2. Select **Admin Server** from the Administration menu.

   The Component Manager page is displayed.

3. Scroll to the **Integration** components section.

4. Select the **SiebelEcmIntegration** and **SiebelIntegrationSearchDisplay** components to enable them.

5. Optionally, select the **SiebelSearchExtension** and **SiebelSearchExtraParams** components. Note that you can disable these components at any time by deselecting them on this page.

6. Click **Update**.

7. Restart Content Server.

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

2.2.4 Set the Configuration Variables

Follow these steps to configure the adapter configuration variables.

1. From the Administration tray in Content Server, click the **Admin Server** link.

2. In the side pane, click the **General Configuration** link.

3. Scroll to the Additional Configuration Variables section, and edit the following entries. (These entries were automatically created when you imported the Configuration Migration Utility Bundle.)

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

Table 2–2   Configuration Variable Entries

Entry	Description
SiebelCssPath=http://*siebel_host:port*/main.css	Use to identify the Cascading Style Sheet (CSS) file to use for the IFrame. This entry links the Siebel CSS file with the adapter so that changes to the Siebel CSS also affect the IFrame. This is optional but recommended; if not specified, the IFrame uses the default CSS file.
	Example Siebel 7.8 URL:
	http://*siebelserver:port*/files/main.css
	Example Siebel 8.x URLs:
	http://*siebelserver:port*/callcenter_enu/files/main.css
	http://*siebelserver:port*/sales_enu/files/main.css
ODDCURLPath=http://*ODDC_host*/*ODDC_webcapture_address*	Use to enable document attachment scanning and importing using Oracle Distributed Document Capture. For configuration instructions, see Section 2.4, "Configuring Oracle Distributed Document Capture." This entry specifies the web address to Oracle Distributed Document Capture.
	Example entry:
	ODDCURLPath=http://xyz/webcapture.asp
ODDCScanAction=1 ODDCScanAction=2	Use to configure document attachment scanning and importing using Oracle Distributed Document Capture, as described in Section 2.4, "Configuring Oracle Distributed Document Capture." In this entry, specify the scan action to be performed, where 1 = Scan and 2 = Import.
AdapterAppFrameLessWindowRequired=true	Specify if standard browser menu options are hidden in browser windows that open from the IFrame display (true) or displayed (false).
AdapterAppCheckinNewBtnVisible=true	Specifies if the **New** button is displayed in the IFrame.
AdapterAppDetachBtnVisible=true	Specifies if the **Detach** button is displayed in the IFrame.
AdapterAppAdvSrchBtnVisible=true	Specifies if the **Search** button is displayed in the IFrame.
AdapterAppConfigureBtnVisible=true	Specifies if the **Configure** button is displayed in the IFrame.
AdapterAppScanBtnVisible=true	Specifies if the **Scan** button is displayed in the IFrame.
AdapterAppRefreshBtnVisible=true	Specifies if the **Refresh** button is displayed in the IFrame.
AdapterAppAdvSrchUCMUIVisible=true	Specifies if full Content Server user interface and search access is available when users click the **Advanced Search** button in the IFrame.

Table 2–2 (Cont.) Configuration Variable Entries

Entry	Description
AdapterAppDisplayLinks=false	If needed, use this variable to replace icons in the IFrame with links, by changing the variable's value to true.
extraSiebelDocParams=*parameter,parameter, parameter,...*	Optionally specify additional parameters to be passed to the **New** button. See Section 2.5, "Passing Extra Metadata Parameters From Siebel to Content Server."
	Example entry:
	extraSiebelDocParams=dDocAccount,xsiebelOrder
extraSiebelScanParams=*parameter,parameter ,parameter,...*	Optionally specify additional parameters to be passed to the **Scan** button. See Section 2.5, "Passing Extra Metadata Parameters From Siebel to Content Server."
	Example entry:
	extraSiebelScanParams=dDocAccount

Note: You can override the entries that determine if the **New**, **Detach**, **Search**, **Configure**, **Scan**, and **Refresh** buttons are displayed by specifying an alternate display mode, as described in Section 2.6.2, "Dynamically Change the Display Mode."

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

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

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

dDocTitle,dDocType,dDocAuthor,dInDate

Note: To avoid an issue with the Siebel Adapter for Content Server, in which the Content Server login page displays in the Siebel page instead of the IFrame, add the following entry to the Content Server config.cfg file:

AllowContentServerInAnyDomains=1

Be aware that setting the AllowContentServerInAnyDomains variable to 1 allows Content Server pages to be opened in IFrames, which could pose a potential security issue.

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4. Restart Content Server.

2.3 Configuring the Adapter for Siebel

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

The Siebel configuration procedures include the following:

- Section 2.3.1, "Lock Siebel Objects"
- Section 2.3.2, "Import the SIF File"
- Section 2.3.3, "Compile Locked Projects"
- Section 2.3.4, "Configure the IFrame URL in the Siebel Web Client"
- Section 2.3.5, "Test the Siebel Configuration"

Important Points

Keep the following points in mind during Siebel configuration:

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

2.3.1 Lock Siebel Objects

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

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

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

2. In the Object Explorer of Siebel Tools, select **Project**.

3. From the Query menu, select **New Query** (Ctrl+Q).

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

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

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

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

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

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

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

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

2.3.2 Import the SIF File

Follow these steps to import Siebel Adapter for WebCenter Managed Attachments objects into Siebel from a Siebel Archive File from a Siebel archive file using the Import Wizard.

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

1. From the Tools menu, choose **Import From Archive**.

2. In the Select Archive To Import dialog box, select the appropriate .sif archive file, and click **Import**. Available SIF files include:

   ■ Siebel_SEA_7.x_UCM_Attachments_YYYYMMDD.sif

   ■ Siebel_SIA_8.x_UCM_Attachments_YYYYMMDD.sif

   ■ Siebel_SIA_7.x_UCM_Attachments_YYYYMMDD.sif

   ■ Siebel_SEA_8.x_UCM_Attachments_YYYYMMDD.sif

3. The SIF file's contents are displayed in the Import Wizard - Preview screen. Ensure that the **Merge** option (middle option) from the Conflict Resolution options is selected, and click **Next**. (This option merges the SIF file changes to existing Siebel Objects.)

4. The wizard displays any conflicting objects found. Click **Next**.

5. A dialog box lists the changes to be made to the repository, and prompts you to proceed. Click **Yes**.

6. A summary is displayed. Click **Finish**.

2.3.3 Compile Locked Projects

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

1. Select **Options** from the View menu.

2. In the Development Tools Options screen, select the Scripting tab.

3. In the **Browser script compilation folder** field, enter a path as follows:

   Client Install Folder/PUBLIC/ENU

   For example, on Windows *Drive_letter*:*Siebel_install_folder_path*\\client\\PUBLIC\\enu

4. Select **Project** in the Object Explorer, locate the *Manage Attachments (UCM)* project and lock it.

5. From the Tools menu, choose **Compile Projects**.
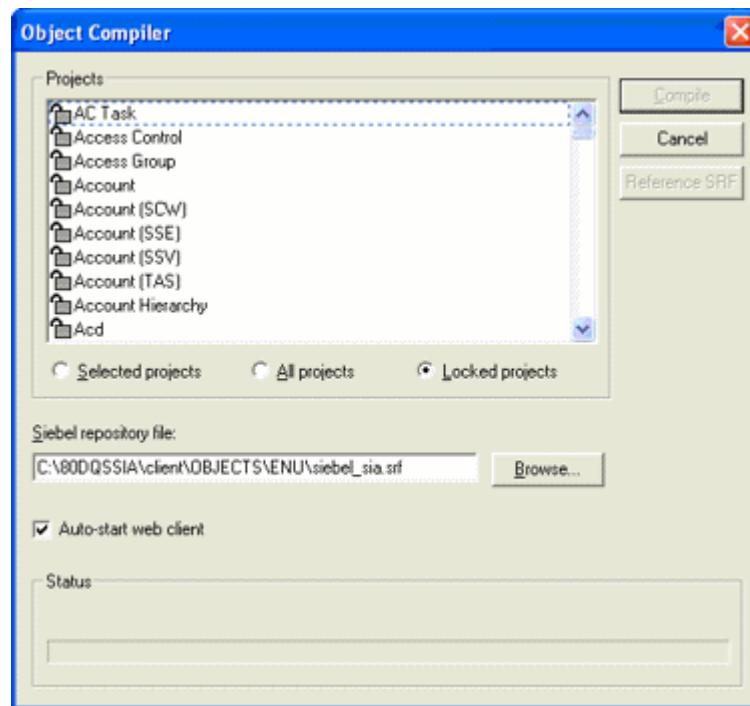
6. In the Object Compiler screen, select **Locked projects**.

7. Verify that the correct repository is selected in the **Siebel repository file** field. This repository file must exist in the Web Client installation folder.

8. Click **Compile**. (Note that compiling may take a while.)

2.3.4 Configure the IFrame URL in the Siebel Web Client

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

1. Launch the Web client, logging in with the User ID: SADMIN.

2. Choose **Sitemap** from the Navigate menu. The site map of the Siebel Web Client Application is displayed.

3. From the list of screens, click the **Administration- Integration** link, then the **Symbolic URL Administration** link.

4. From the Host Administration field, select **Symbolic URL Administration**.

5. Create a new record by clicking the **New** button.

6. Complete the following fields for the URL. With the new URL selected in the Symbolic URL table, a Symbolic URL Arguments pane becomes displayed below.

Field	Value to Enter
Name	`UcmServUrl`
URL	`http://Content_Server_URL/_p/cc-embedded` (example: `http://content-server-name.domain:port-number/cs/idcplg/_p/cc-embedded`)
Fixup Name	`InsideApplet`
SSO Disposition	`IFrame`

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

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

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

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

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Substitute in Text	Sequence #
IdcService	N	Constant	GET_SEARCH_RESULTS_FORCELOGIN	Y	N	1
siebelEntityField	N	Field	SiebelEntityName	Y	N	2
siebelEntityValue	N	Field	Id	Y	N	3

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Substitute in Text	Sequence #
QueryText	N	Field	QueryText	Y	N	4
SearchQueryFormat	N	Constant	Universal	Y	N	5
ResultTemplate	N	Constant	SIEBEL_SEARCH	Y	N	6
coreContentOnly	N	Constant	1	Y	N	7
SortField	N	Constant	dInDate	Y	N	8
SortOrder	N	Constant	Desc	Y	N	9
SearchEngineName	N	Constant	DATABASE.METADATA	Y	N	10
ResultCount	N	Constant	6 (See Section 2.3.4.1, "Configure the IFrame Height.")	Y	N	11
IFrameSRC	N	Command	IFrame Height=280 Width=100% (See Section 2.3.4.1, "Configure the IFrame Height.")	Y	N	12

2.3.4.1 Configure the IFrame Height

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

- *ResultCount* determines the number of results that display on a results page before pagination controls are added at the bottom of the screen.

- *IFrameSRC height* determines the height (in pixels) of the IFrame.

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

For this reason, it is recommended that you adjust the ResultCount and IFrameSRC height settings in combination so that no scroll bar is displayed. Ensure that the

IFrame height accommodates the result count. A recommended setting combination is an IFrame height setting of 280 and ResultCount setting of 6.

2.3.5 Test the Siebel Configuration

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

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

---

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

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

Setting AllowContentServerInAnyDomains

If the Content Server login page displays in the Siebel page instead of the IFrame, setting `AllowContentServerInAnyDomains=1` in the Content Server config.cfg fixes the issue.

Note: Be aware that setting the AllowContentServerInAnyDomains variable to 1 allows Content Server pages to be opened in IFrames, which could pose a potential security issue.

2.4 Configuring Oracle Distributed Document Capture

This section covers the following topics:

- Section 2.4.1, "About Document Scanning Using Oracle Distributed Document Capture"
- Section 2.4.2, "Configure Oracle Distributed Document Capture For the Siebel Adapter"
- Section 2.4.3, "Configure Content Server for Distributed Document Capture Via the Adapter"
- Section 2.4.4, "Test the Distributed Document Capture Via Siebel Adapter Configuration"

2.4.1 About Document Scanning Using Oracle Distributed Document Capture

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

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

- A **Scan** button is added to the Managed Attachments IFrame. The user clicks the button, and selects a **document classification**, which is assigned to an Oracle

Distributed Document Capture scan profile. For example, the user might select a classification of *Identity Documents* to scan a photocopy of a driver's license or passport. (An Oracle Distributed Document Capture scan profile specifies scanning, importing, and indexing settings.)

- When the user clicks the Scan Document button, Oracle Distributed Document Capture's remote client launches in a new window, automatically authenticates and logs in the user, and passes in parameters such as the scan profile to be used and the Siebel entity value for later attachment.

- Within the Oracle Distributed Document Capture client, the user reviews the document, makes changes as needed, completes any index fields configured in the scan profile, then sends the batch. Sending the batch commits the new document to Content Server using an Oracle 11g UCM commit profile specified for the scan profile. (A Capture UCM commit profile specifies connection information and field mappings between Capture and Content Server metadata fields.)

- Upon successful sending, the user returns to the Managed Attachments IFrame and refreshes the display to view the newly scanned document or imported scanned image file.

2.4.2 Configure Oracle Distributed Document Capture For the Siebel Adapter

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

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

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

Figure 2–1   Distributed Document Capture Server Configuration, System Settings Tab
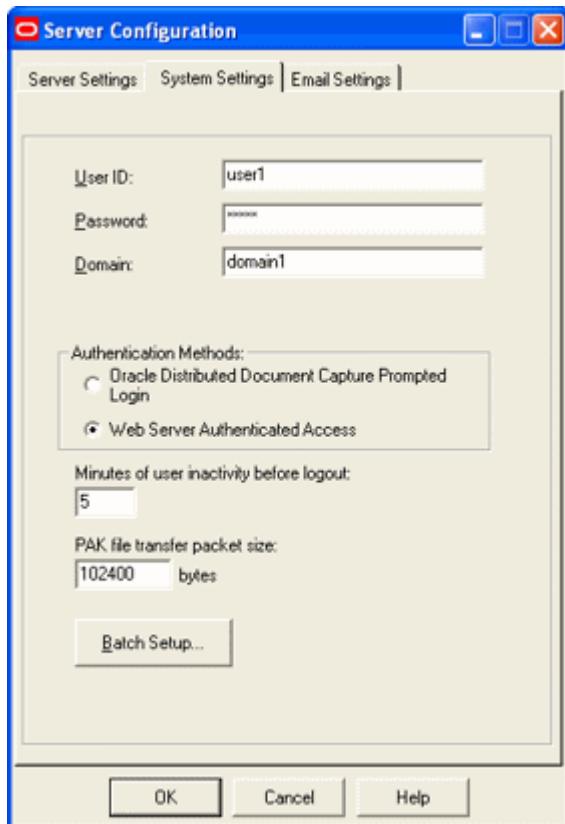
2. In Capture Administration, add index fields to a selected file cabinet for capturing values for new documents, as shown in Figure 2–2. For details, see the section on Capture Administration in the *Administrator's Guide for Oracle Distributed Document Capture*.

    ■   Create index fields for values you want saved with attached documents on the Content Server. For example, you might configure Doc Type and Security Group pick-list index fields for users to select from standard settings.

    ■   Create an index field to contain the Siebel entity value. Name the field based on the Siebel entity you are using, listed in Table 2–3:

Table 2–3   Siebel Entity Identifier

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

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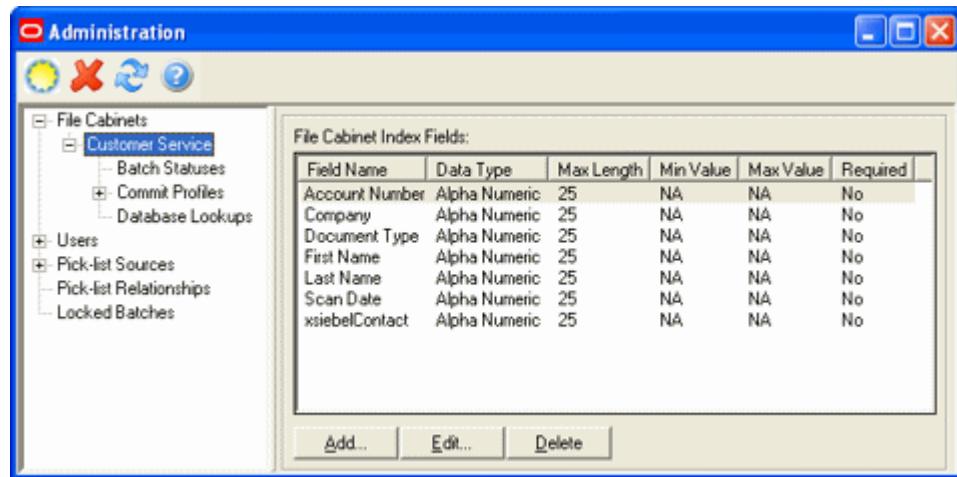
3. In Oracle Distributed Document Capture's Profile Administration, create a scan profile, as shown in Figure 2–3. Later, you associate this scan profile with one or more document classifications, so that when a user selects a classification, the associated scan profile's settings are used. For details,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

- On the General pane, select **2 - Scan and Index Documents** in the Scanning Type field. This scanning type includes indexing, and scans or imports pages into a single document in a batch. Specify a file cabinet and batch prefix.

- On the Document Indexing pane, move all fields you want displayed to users to the Selected Fields box.

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

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

Figure 2–3   Scan Profiles, Oracle Distributed Document Capture Profile Administration
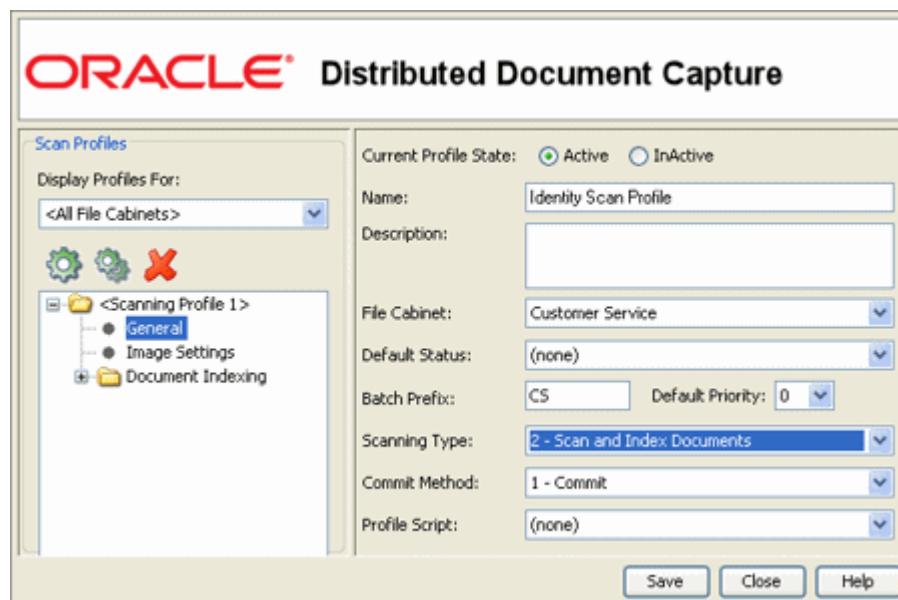
4. In Capture Administration, create an Oracle UCM 11g commit profile to commit the scanned or imported documents to Content Server when users send a completed batch. See Figure 2–4.

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

- Select **Oracle UCM 11g Commit Driver** in the Commit Driver field. Click the Configure button adjacent to the Commit Driver field.

- On the Login tab, specify settings for logging in to the Content Server instance. (The other tabs become active after you log in.)

- On the Check-In tab, specify how to name documents and assign Type, Security Group, and Account values.

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

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

- Activate the Siebel-UCM commit profile.

Figure 2–4   Capture Administration, Oracle UCM 11g Commit Settings
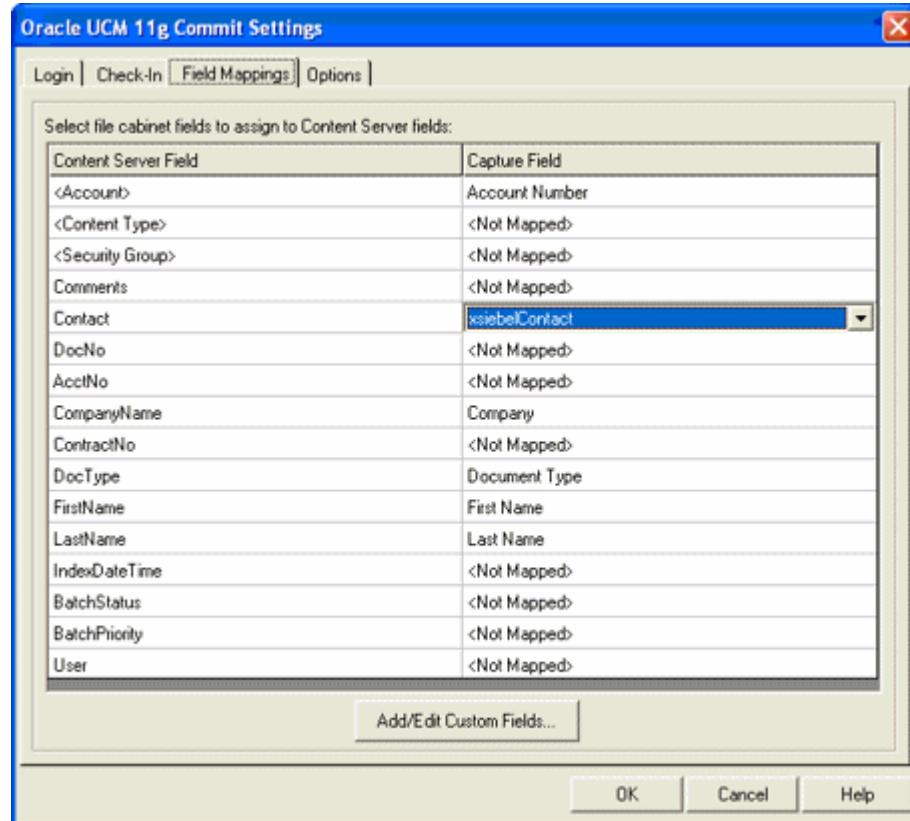
2.4.3 Configure Content Server for Distributed Document Capture Via the Adapter

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

1. On Content Server, edit the following configuration variables for Oracle Distributed Document Capture, if you have not done so. See Section 2.2.4, "Set the Configuration Variables."

   - ODDCURLPath=http://*ODDC_host*/*ODDC_webcapture_address*
   - ODDCScanAction=*ODDC Scan Action*
   - AdapterAppScanBtnVisible=true

2. Restart Content Server.

3. On Content Server, configure document classification and scan types.

   - From the Administration tray in Content Server, click the **Admin Applets** link.
   - Select the Configuration Manager applet. The Configuration Manager is displayed.

■ Click the Views tab, select DocClassView from the alphabetical list, and click **Edit Values**.
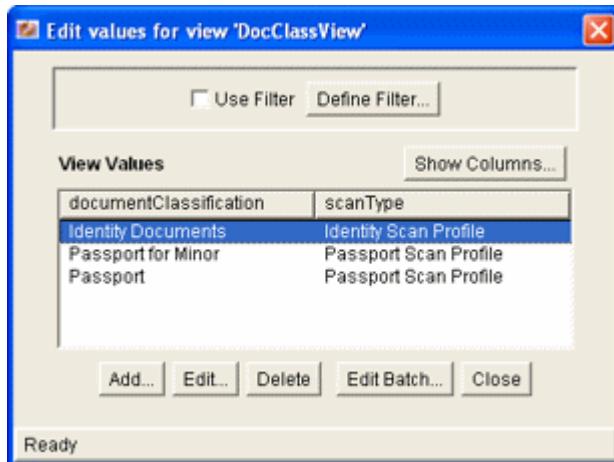
4. In the Edit Values screen, click **Add** and add document classifications and their corresponding scan profile. Note that documentClassifications entries must be unique, but a scan profile can be used multiple times. Click **Close** when done.

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

2.4.4 Test the Distributed Document Capture Via Siebel Adapter Configuration

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

1. Refresh the Managed Attachments IFrame results page. You should see a Scan button beside the New button.

2. Click the Scan button. In the Scan Document page, select a document classification and click **Scan Document**. The Oracle Distributed Document Capture client launches.

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

3. Within the Oracle Distributed Document Capture client, review, index, and send the document's batch.

4. Return to the Managed Attachments IFrame and click **Refresh Page**. The newly scanned document or imported scanned image file should be displayed in the list. (It may take a few minutes to be displayed.)

2.5 Passing Extra Metadata Parameters From Siebel to Content Server

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

Here's how it works:

■ To pass values, you need a Siebel field and a Content Server metadata field.

- Two configuration variables are provided: one for new documents and the other for scanning documents. You set these variables to the metadata field(s) to populate on the Content Server side.

- You add arguments to the symbolic URL (with the prefix *extra* added to the variable name) that link the Siebel and Content Server fields, so that they are appended to the New or Scan button URL. When the IFrame is displayed, the application searches the URL for extra parameter variables and uses their assigned values to populate New or Scan button actions.

- Depending on configuration, extra values being passed may be visible or hidden from users checking in or scanning documents. For example, you might hide an account number, but for another value, you might populate a dropdown field and allow users to change the value.

Configuring extra metadata parameters involves the following main steps:

- Section 2.5.1, "Configure Content Server for Extra Parameters"

- Section 2.5.2, "Configure Siebel for Extra Parameters"

2.5.1 Configure Content Server for Extra Parameters

Follow these steps to configure extra parameters on the Content Server side.

1. Ensure that the *SiebelSearchExtraParams* component is enabled. See Section 2.2.3, "Enable the Siebel Adapter Content Server Components."

2. Set the extraSiebelDocParams and extraSiebelScanParams configuration variables.

   Specify the Content Server field or fields to populate. Define *extraSiebelDocParams* to pass values using the New button, and *extraSiebelScanParams* to pass values using the Scan button. For information about configuration variables, see Section 2.2.4, "Set the Configuration Variables."

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

   - extraSiebelDocParams=dDocAccount

   - extraSiebelScanParams=dDocAccount

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

     extraSiebelDocParams=dDocAccount,xsiebelOrder

     extraSiebelScanParams=dDocAccount,dDocType

     ---

3. Update profiles as needed to accommodate the passed values (without the *extra* prefix).

   - If passing values using the New button, update the Content Server content profile to display the metadata field you specified, if needed.

   - If passing values using the Scan button, update the scan profile to display the index field, if desired. (The index field must exist for the file cabinet being used.) In the commit profile, map the index field to the appropriate Content Server metadata field.

2.5.2 Configure Siebel for Extra Parameters

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

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

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

3. Compile the business component.

2.6 Customizing the Siebel Adapter IFrame Display

You can customize the Siebel Adapter in the ways described in the following sections:

- Section 2.6.1, "Add Custom Buttons"

- Section 2.6.2, "Dynamically Change the Display Mode"

- Section 2.6.3, "Change Display Colors"

2.6.1 Add Custom Buttons

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

1. Using Component Manager, create a custom component. Create an include resource that overrides the following resource includes:

   - js_custom_siebel_functions

   - custom_configurable_btn_bar

   - js_custom_configurable_btn_bar

2. After applying these resource includes, enable the component in Content Server.

js_custom_siebel_functions

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

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

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

      /**
        * Function for custom functionality added to the existing adapter.
        *
        */
      YAHOO.oracle.ucm.adapter.extension.customFunctionListener=function(){
          //custom code goes in here
          alert("You have your custom functionality running");
      };
      </script>
<@end@>
```

custom_configurable_btn_bar

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

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

js_custom_configurable_btn_bar

This code associates the listener function with the button code.

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

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

2.6.2 Dynamically Change the Display Mode

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

Here's how it works:

- By default, no dynamic display mode is configured. Under normal default settings, buttons in the IFrame are displayed according to their configuration variable settings (see Section 2.2.4, "Set the Configuration Variables"). Columns are displayed according to the user's field configuration settings, and if columns are displayed, their icons are always functional.

- A parameter called *SiebelDisplayMode* sets the alternate display mode's combination of disabled buttons and icons. When set, this parameter overrides the other configuration variables (for example, AdapterAppCheckinBtn=true). The SiebelDisplayMode parameter is an integer that you calculate. During display, the integer is translated to dynamically determine the button and icon status.

- You activate the alternate dynamic display mode by configuring a secondary symbolic URL for the IFrame and specifying the SiebelDisplayMode parameter within it. Then, for business objects that require the alternate display mode, you change the symbolic URL to point to the secondary symbolic URL.

2.6.2.1 Calculate the SiebelDisplayMode Integer

Each button and icon is assigned an integer value, as shown in Figure 2–5 and listed in Table 2–4. Calculate the display mode integer by adding the integer value of each button and icon to be disabled.

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

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

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

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

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

Button or Icon	Integer Value
Info Icon	20
Edit Icon	21

Table 2–4   (Cont.) Integer Values for Calculating a Display Mode Integer

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

> **Note:**   To hide custom buttons, see Section 2.6.2.3, "Calculate Values for Custom Buttons."

2.6.2.2 Configure Siebel for Special Display Mode

After calculating a display mode integer, as described in Section 2.6.2.1, "Calculate the SiebelDisplayMode Integer," follow these steps to configure the alternate display mode.

1. In the Siebel Web Client, configure a secondary symbolic URL for the IFrame.

    - Enter a new name for the URL (for example, UcmServUrl2) and select the same settings as the original URL. For more information, see Section 2.3.4, "Configure the IFrame URL in the Siebel Web Client."

    - Include an additional argument that specifies the SiebelDisplayMode parameter as shown below and in the illustration that follows:

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

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

2.6.2.3 Calculate Values for Custom Buttons

If you have added custom buttons to the IFrame (as described in Section 2.6.1, "Add Custom Buttons") and want to hide them in an alternate display mode, include their values in the integer calculation.

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

js_custom_button_visibility_handler

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

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

2.6.3 Change Display Colors

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

- background

- highlighted row

- hover row

1. Create a component and override the following resource includes:

    - css_adapter_background_styling

    - css_adapter_row_styling

css_adapter_background_styling

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

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

css_adapter_row_styling

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

```
<@dynamichtml css_adapter_row_styling@>
    <$selectedRowColor="#eac5a6"$>
    <$highlightedRowColor="#bdc1a3"$>
```

```
        <$include super.css_adapter_row_styling$>
     <@end@>
```

2.7 Uninstalling the Adapter

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

- Section 2.7.1, "Disable Adapter Components on Content Server"
- Section 2.7.2, "Uninstall Siebel Components"

2.7.1 Disable Adapter Components on Content Server

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

1. Log in to Content Server as an administrator.

2. Select **Admin Server** from the Administration menu.

   The Component Manager page is displayed.

3. Scroll to the **Integration** components section.

4. Deselect the Siebel adapter components to disable them.

   - SiebelEcmIntegration
   - SiebelIntegrationSearchDisplay
   - SiebelSearchExtension
   - SiebelSearchExtraParams
   - SiebelFilter

   (For details about these components, see Section 2.2.3, "Enable the Siebel Adapter Content Server Components.")

5. Click **Update**.

6. Restart Content Server.

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

2.7.2 Uninstall Siebel Components

Uninstalling Siebel adapter components includes *activating* the default Siebel File Attachment Applets that were disabled during adapter configuration, and *deactivating* the applets the SIF file added for the adapter configuration. See Section A.2, "Activating or Deactivating Siebel Objects."

A

Siebel Object Locking

If you encounter issues when importing the SIF file and locking the Siebel Projects (see Section 2.3.1, "Lock Siebel Objects"), you can lock Siebel objects individually. This appendix lists the Siebel objects (Projects, Applets, Views, and Business Components) locked during Siebel configuration (see Section 2.3, "Configuring the Adapter for Siebel").

Importing the SIF file deactivates certain Siebel applets. See Section A.2, "Activating or Deactivating Siebel Objects" for instructions in activating or deactivating Siebel applets, if needed.

This appendix includes the following sections:

- Section A.1, "Objects Locked During SIF Import and Project Locking Process"
- Section A.2, "Activating or Deactivating Siebel Objects"

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

Importing the SIF file and following the Siebel project locking process described in Section 2.3.1 locks the objects detailed n the following sections:

- Section A.1.1, "Projects Locked"
- Section A.1.2, "Applets Locked"
- Section A.1.3, "Views Locked"
- Section A.1.4, "Business Components Locked"

A.1.1 Projects Locked

Table A–1   Projects Locked (SIA and SEA)

Projects	SIA	SEA
Account	X	X
Account SSE	X	X
Activity	X	X
Activity SSE	X	X
Asset Management	X	X
Contact	X	X
Contact SSE	X	X
ERM Unified Help Desk	X	X

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

Projects	SIA	SEA
FINS Call Reports	X	X
FINS Call Reports2	X	X
FINS Call Reports SSE	X	X
FINS INS Claims	X	X
FINS INS Claims Appraisals/Bills/Attachments	X	X
Oppty	X	X
Oppty SSE	X	X
Order Entry	X	X
PS Project Management	X	X
PS Project Management SSE	X	X
PUB Case	X	
PUB Evidence	X	
PUB HLS Incident	X	
PUB HLS Physical Terrorism	X	
PUB Lead	X	
Quote	X	X
Quote UI	X	X
Service	X	X
Service SSV	X	X
VERT CUT Common	X	X

A.1.2 Applets Locked

Table A–2   Applets Locked

Applets	SIA	SEA
Activity Form Applet	X	
Agent Service Request Detail Applet	X	X
Asset Mgmt - Asset Detail Applet	X	X
Asset Mgmt - Asset Detail Applet - Header	X	X
Contact Form Applet	X	X
FINCORP Call Report Form Applet (Short)	X	X
HLS Case Form Applet	X	
HLS Group Form Applet	X	
HLS Suspect Form Applet - Header	X	
INS Claims Form Applet	X	X
Opportunity Form Applet - Child	X	X
Order Entry - Order Form Applet Dashboard	X	X
Order Entry - Order Form Applet Dashboard (Sales)	X	X

Table A–2   (Cont.) Applets Locked

Applets	SIA	SEA
Project Entry Applet	X	X
PUB Arrest List Applet	X	
PUB Evidence Form Applet	X	
PUB HLS Incident Form Applet - Header	X	
PUB Lead Form Applet	X	
PUB Offense List Applet	X	
Quote Form Applet	X	X
Service Request Detail Applet	X	X
SIS Account Entry Applet	X	X

A.1.3 Views Locked

Table A–3   Views Locked

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

A.1.4 Business Components Locked

Table A–4   Business Components Locked

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

A.2 Activating or Deactivating Siebel Objects

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

1. In the Object Explorer, identify a View that holds the Managed Attachments Applet from the Web client. (Identify a View by selecting **About View** from the Help menu.)

2. Expand the View and select **View Web Template Item**. The list of Applets contained in the View is displayed.

3. Select an Applet from Table A.1.2 and activate or deactivate as needed.

    ■ Activate an Applet by setting its Inactive Attribute to False.

    ■ Disable an Applet by setting its Inactive Attribute to True.

B

Configuring Additional Siebel Objects

If the Siebel Adapter for WebCenter Managed Attachments solution needs to be used with additional Siebel entities, over and above those automatically configured (see Section 1.3, "Automatically Configured Siebel Entities"), follow the steps in this Appendix. The Siebel Adapter for WebCenter uses an IFrame to display Managed Attachments. Before use, an IFrame applet must be created and configured for each business object.

This appendix contains the following topics:

- Section B.1, "Identifying Objects to Lock"
- Section B.2, "Locking Additional Siebel Objects"
- Section B.3, "Adding Fields to the Business Component"
- Section B.4, "Creating an Applet for the IFrame"
- Section B.5, "Modifying Applet View Layout"
- Section B.6, "Inactivating Existing Applet from View"
- Section B.7, "Adding the New Applet to the View"
- Section B.8, "Set IFrame to Refresh When Parent Applet Changed"
- Section B.9, "Compiling the Additional Objects Project"
- Section B.10, "Configuring the IFrame URL in the Siebel Web Client"
- Section B.11, "Testing the Additional Objects Siebel Configuration"
- Section B.12, "Creating a SIF File for Export"
- Section B.13, "Configuring Content Server"

B.1 Identifying Objects to Lock

Prior to modifying Siebel business objects, you must identify and lock those business components, applets, and views affected. To identify what to lock, do the following:

1. Log in to Siebel Web Client with User ID: SADMIN.

2. Select the tab of the business object being modified. For example, select the Agreements tab if modifying a Service Agreement. The object screen is displayed.

3. Select the Attachments tab. A listing of attachments associated with the existing applet is displayed.

4. Select **About View** from the Web Client Help menu. The About View screen is displayed with information about the view, applets, and business components

used for the selected object. For example, if modifying a service agreement object, information on the following items might be displayed:

- **Screen**: Agreement Screen

- **View**: Agreement Attachments View

- **Business Object**: Service Agreement

- **Applets**: Applet[0]: LS Medical Agreement Detail Applet; Applet[1]: Agreement New Attachment List Applet;

- **Business Components**: BusComp[0]: Service Agreement; BusComp[1]: Agreement New Attachment;

In this example you are replacing the Agreement New Attachment List Applet (Applet[1]).

5. Note the information and click **OK** to close the About View screen.

Figure B–1   The About View Screen
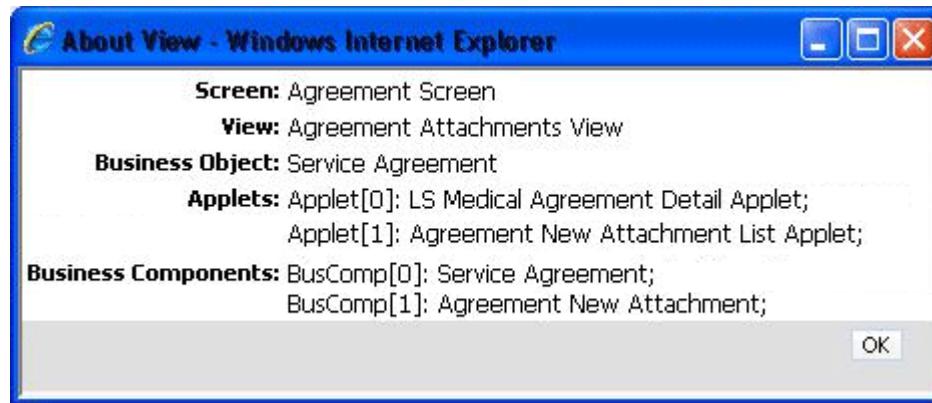
B.2 Locking Additional Siebel Objects

Once the appropriate business components, applets, and views have been identified, you must use Siebel Tools to search and determine the associated projects.

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

2. Search for the view, applets, and business components that you noted in the About View screen to find the projects associated with each. For example, you may find the following projects associated with a Service Agreement object:

- Srvagree (SSV)

- LS Medical Terms

- Srvagree

3. Search for the projects you found in step 2 by doing the following:

   a. Select **Project** in the Object Explorer and press **Ctl+Q** to display the query dialog screen.

   b. Enter a query string that includes the projects found in step 2 and press **Enter**. A list of projects is displayed. In this example, the query string would be

   ```
   Srvagree ?SSV? OR LS Medical Terms OR Manage Attachments?UCM? OR Srvagree
   ```

4. Lock each project found in step 2 by selecting the **Locked** column next to the project name. This locks all objects, views, applets, business components, and screens that are associated with each project. A check mark is displayed in the Locked column when a project is successfully locked.

Figure B–2 Project Listing with Projects Locked
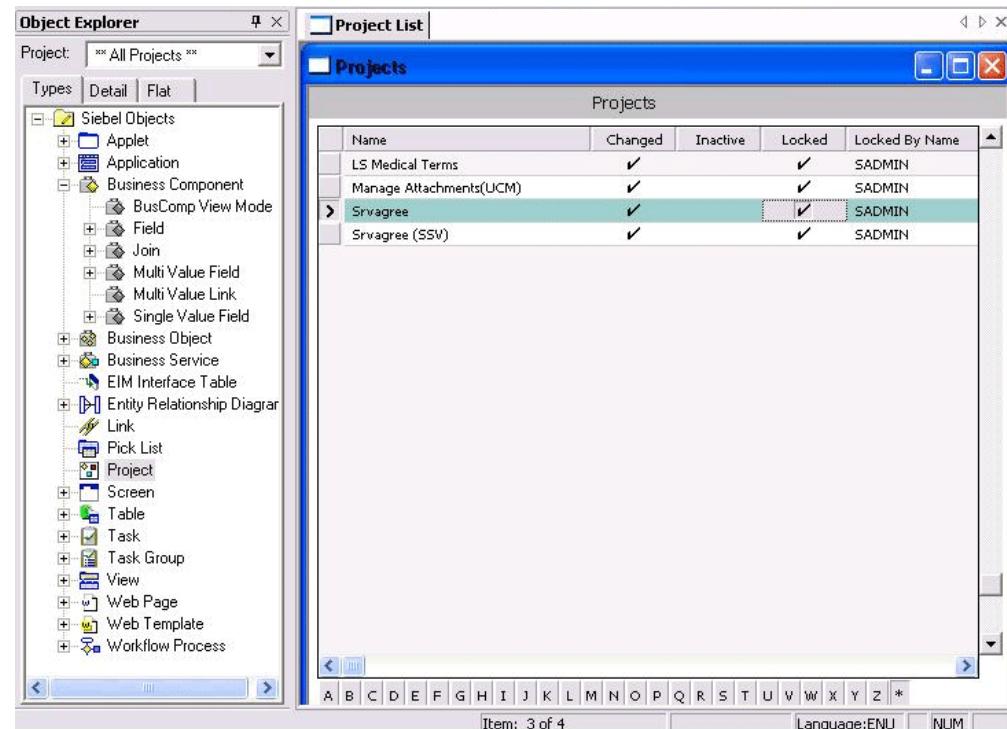
B.3 Adding Fields to the Business Component

After locking all projects associated with the identified business components, applets, and views, you must add fields to the appropriate business component. For example, to add fields to the Srvagree project, do the following:

1. Select **Srvagree** in the Projects List.

2. Select **Field** under Business Component in the Object Explorer. The Field List is displayed.

3. Add the following fields:

Name	Calculated	Calculated Value
UcmServUrl	Yes	UcmServUrl
SiebelEntityName	Yes	xsiebelAgreement
QueryText	Yes	`[SiebelEntityName]+" <matches> "+"`"+[Id]+"`"`

> **Note:** Ensure that the correct single quote "`" is used in the last part of the QueryText Calculated Value string. It is typically the character on the key to the left of the number 1 key. Also ensure that there is a space on either side of <matches>.

B.4 Creating an Applet for the IFrame

Once fields are added to the business object, you must create an applet for the IFrame. For this example, do the following:

1. From the File Context Menu, select **New Object**. The New Object Wizard is displayed.

Figure B–3   The New Object Wizard Screen
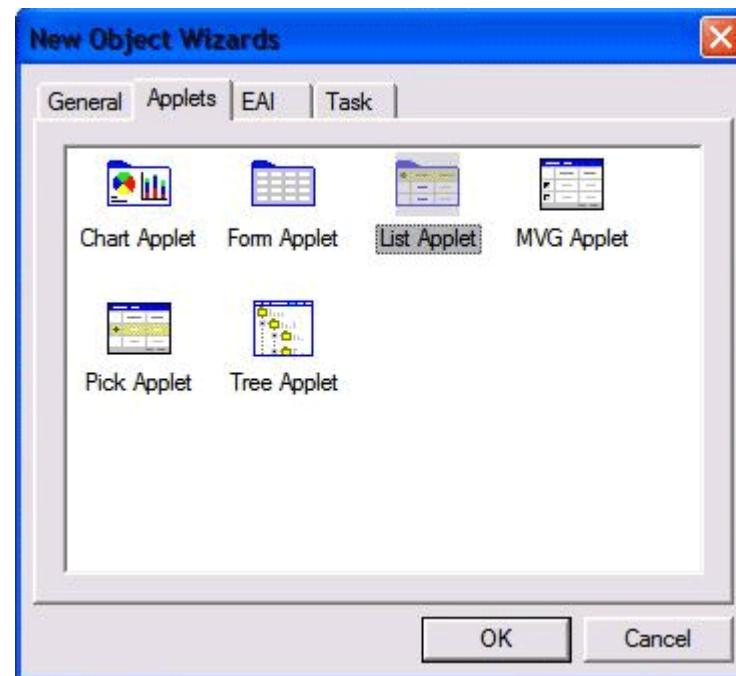
2. Under the Applets tab, select **List Applet** and click **OK**. The New Applet Wizard is displayed.

Figure B–4   The New Applet Wizard Screen
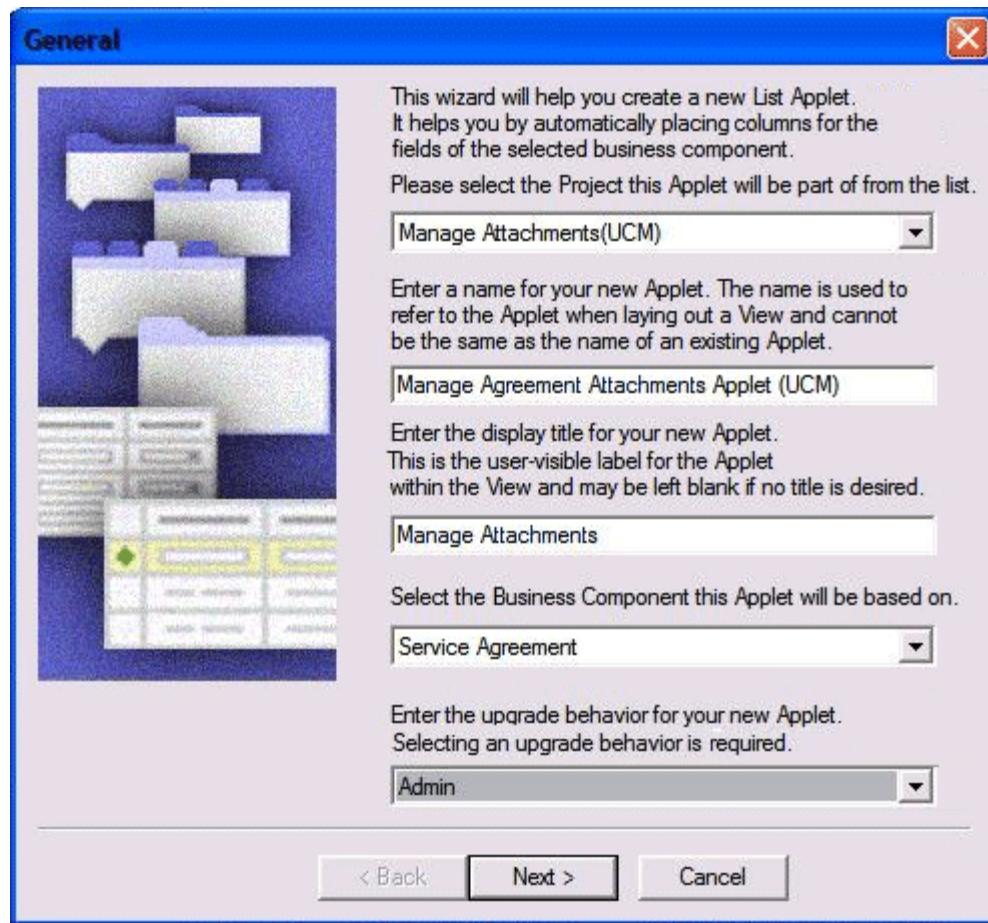
3. Select **Manage Attachments (UCM)** as the project.

4. Enter a descriptive name. For example, **Manage Agreement Attachments Applet (UCM)**.

5. Enter **Managed Attachments** as the display title.

6. Select **Service Agreement** as the Business Component the applet is to be based on.

7. Select **Admin** as the upgrade behavior, then click **Next**. The Web Layout screen is displayed.

Figure B–5   The Web Layout Screen
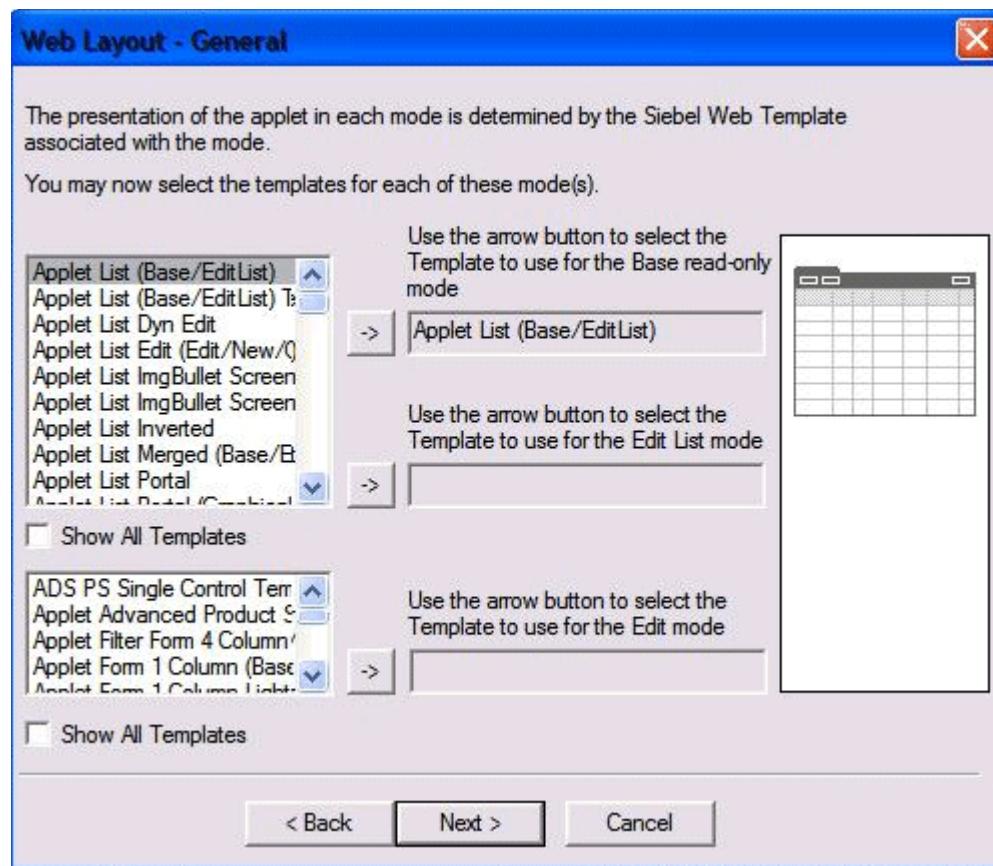
8. Select **Applet List (Base/Edit List)** from the first list of template options and click the arrow to confirm its use, then click **Next**. The Fields screen is displayed.

Figure B–6   The Fields Screen with Available Fields Section
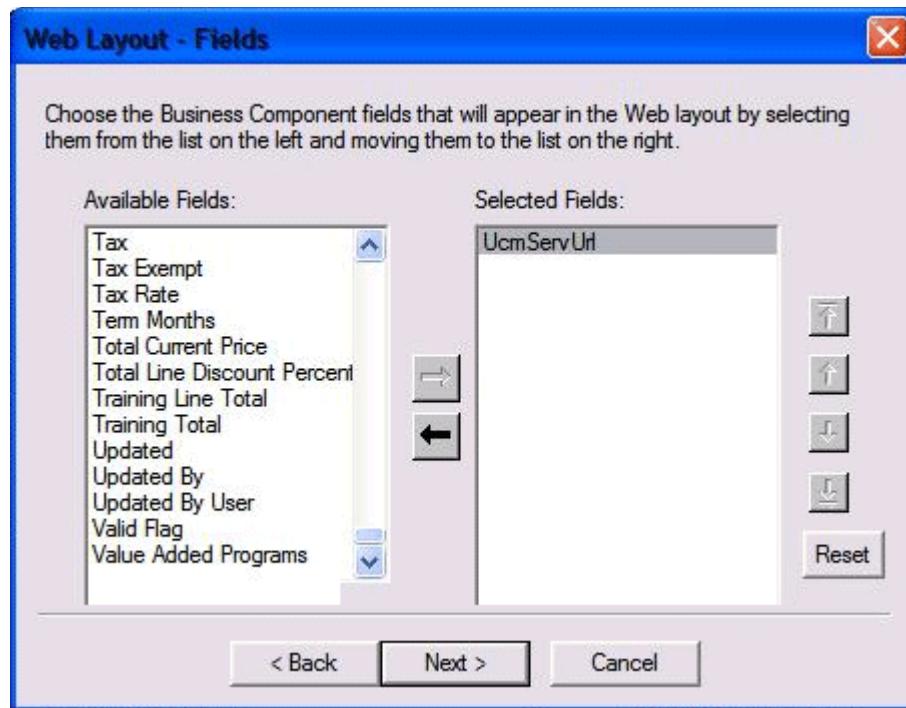
9. Select **UcmServUrl** from the Available Fields section and click the arrow to move it to the Selected Fields section and click **Next**. The Fields screen changes to display the Available Controls section.

Figure B–7   Fields Screen with Available Controls Section
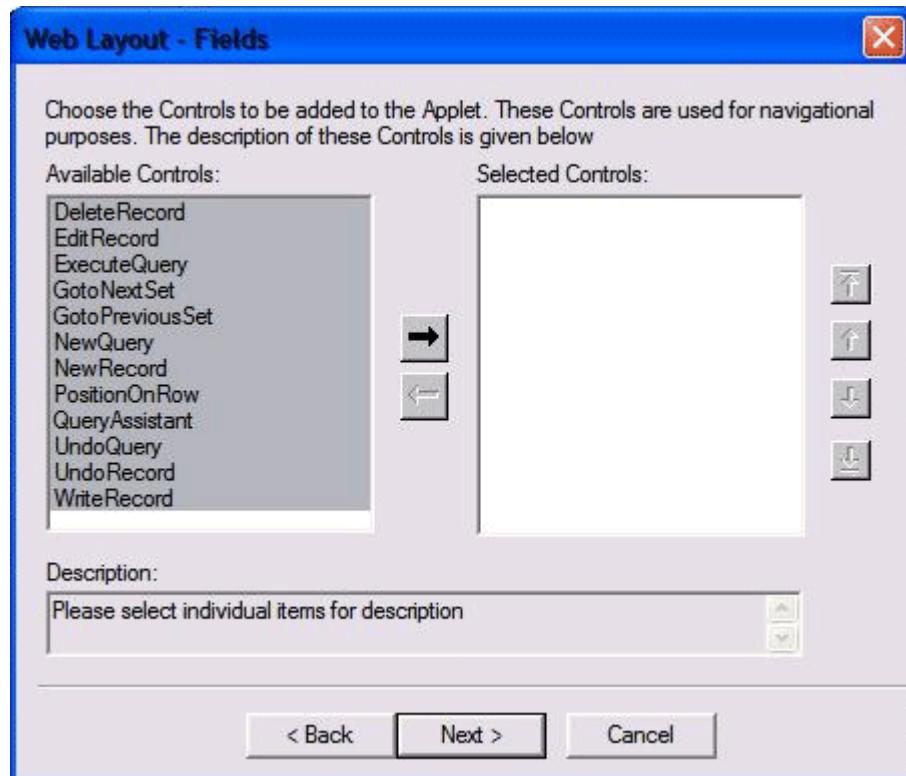
10. Select all controls in the Available Controls section and click the arrow to move them to the Selected Controls section, then click **Next**.

11. Click **Finish**. The IFrame applet is created.

B.5 Modifying Applet View Layout

When created, the IFrame applet uses a generic layout. To view and modify the layout, do the following:

1. Right-click on the newly created applet and select **Edit Web Layout** from the contextual menu. The new applet is displayed using the Web Template (base) layout.

2. Expand **Applet** in the Object Explorer then expand **List** and select **List Column**. The List Columns screen is displayed showing the UcmServUrl as a list control. The UcmServUrl list control is a place holder for the IFrame.

3. In the **Field Retrieval Type** column, select **Symbolic URL** as the attribute.

4. In the **HTML Type** column, select **Field** as the attribute.

5. Under **Applet** in the Object Explorer, expand **Applet Web Template** and select **Applet Web Template Item**. A screen is displayed listing the available templates in the top section and the available items on the bottom section.

6. Select **Base** in the top Applet Web Templates section of the screen. The Web Template dialog is displayed.
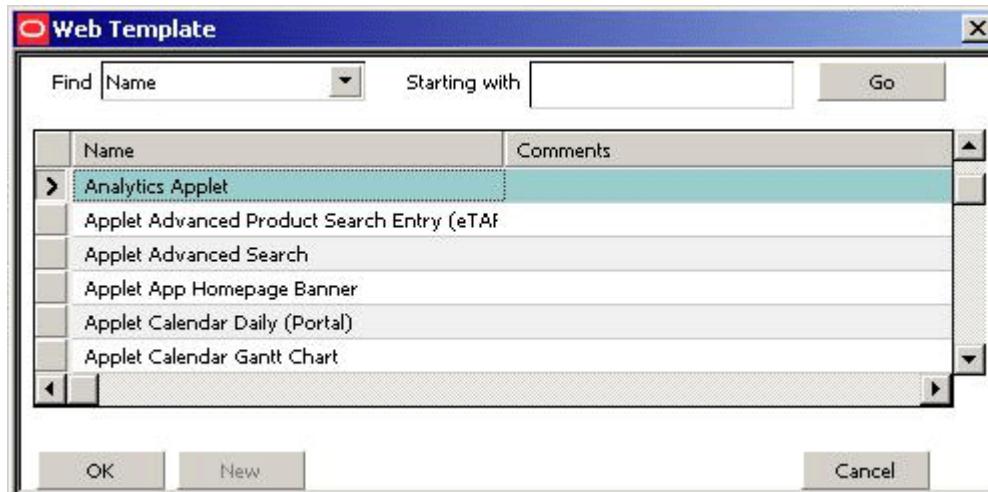
7. Select **Analytics Applet** from the Name column and click **OK**. The Web Template dialog closes.

8. Save all.

9. Confirm the changes have been saved by right-clicking on the applet and selecting **Edit Web Layout** from the contextual menu. The applet is displayed using the modified layout.

B.6 Inactivating Existing Applet from View

Before you can use the newly created applet, you must inactivate the old applet from the view. To inactivate the old applet, do the following:

1. Search for the old view name. Find the old view's name by selecting **About View** from the Web Client Help menu. In this example, search for the Agreement Attachments View. The Views screen is displayed.

2. Select the old view in the Views screen.

3. In the Object Explorer, expand **View**, then expand **View Web Template** and select **View Web Template Item**. The View Web Template Items screen is displayed.

4. Select the applet in the View Web Template Items section and enable **Inactive**.

> **Note:** If editing the properties directly rather than editing the record, set the **inactive** attribute to **True**.

B.7 Adding the New Applet to the View

After inactivating the old applet from the view, follow these steps to add the new applet:

1. In the Object Explorer, expand **View**, right-click on the view and select **Edit Web Layout** from the contextual menu. The applet is displayed.

2. Drag and drop the List applet onto the place holder showing the Child applet. A Pick Record dialog asking for the particular list applet is displayed.

3. Select the name of the new applet from the list and click **Pick**. The new applet is added to the view.

B.8 Set IFrame to Refresh When Parent Applet Changed

By default, the new applet caches information when a parent record is displayed. If the parent record is changed, the information in the applet view does not get refreshed. You must add a browser script to ensure the applet information is refreshed by doing the following:

1. Determine the parent applet of the new Managed Attachments applet by expanding **View Web Template** under the **View** section of the Object Explorer and selecting **View Web Template Items**.

2. In the View Web Template Items screen, right-click on the parent applet and select **Edit Browser Scripts** from the contextual menu. Events associated with the applet are displayed in the Object Explorer.

3. In the **General Declaration**, add the following:

```
var applet;
function refresh()
{
    applet.InvokeMethod("ToggleTo");
}
```

4. In the **Applet_Load** event, add the following:

```
function Applet_Load()
{
    applet = this;
}
```

5. In the Applet_ChangeRecord event, add the following:

```
function Applet_ChangeRecord()
```

```
{
  setTimeout("refresh()",10);
}
```

> **Note:** To activate the browser script you will need to execute the
> 'genscript' command. Once you have compiled your work to a new
> SRF and copied the SRF to your server directory, execute the
> following command (change to match your environment):
>
> ```
> genbscript "ENU\siebel.cfg" D:\sea\siebsrvr\WEBMASTER ENU
> ```
>
> You then need to restart IIS by restarting the IIS Admin Service from
> within the Windows Services screen.

B.9 Compiling the Additional Objects Project

To compile the completed project, do the following:

1. From the tools menu, select **Compile Projects**. The Object Compiler screen is displayed.

2. Select **Locked Projects**.

3. Verify that the correct repository is selected in the **Siebel repository file** field. This repository file must exist in the Web Client installation folder.

4. Click **Compile**. The length of time necessary to compile varies and may be extensive.

B.10 Configuring the IFrame URL in the Siebel Web Client

Follow the procedure detailed in Section 2.3.4, "Configure the IFrame URL in the Siebel Web Client."

B.11 Testing the Additional Objects Siebel Configuration

Test the configuration by following the steps in Section 2.3.5, "Test the Siebel Configuration."

B.12 Creating a SIF File for Export

After compiling and testing the project, follow these steps to unlock the modified objects and create a new SIF file for export.

1. Unlock all projects locked in Section B.2, "Locking Additional Siebel Objects" and select each object.

2. Right-click on the selected objects and choose **Add to Archive** from the contextual menu. The Export to Archive File screen is displayed.

3. In the Export to Archive File screen open, right-click on each object to export and select **Add to Archive** from the contextual menu. Repeat until all objects for export are added to the archive.

4. Enter or browse to a location and enter a name for the exported SIF file in the **Archive file** field of the Export to Archive File screen and click **Save**. The SIF file is created in the specified location.

B.13 Configuring Content Server

After completing the necessary Siebel configuration, you must configure Content Server to support the exposed entity. This section has the following topics:

- Section B.13.1, "Adding Content Server Information Fields"
- Section B.13.2, "Adding Rules for Displaying Fields"
- Section B.13.3, "Editing Necessary Content Server Resource and String Files"

B.13.1 Adding Content Server Information Fields

You must add the appropriate information fields to Content Server using the Content Server Configuration Manager applet. To add the appropriate fields, do the following:

1. Log in to Content Server as an administrator.

2. Open the **Administration** panel and click **Admin Applets**. The Admin Applets page is displayed.

3. Click **Configuration Manager**. The Configuration Manager screen is displayed.

4. Ensure that the Information Fields tab is displayed and click **Add**. The **Add Metadata Field Name** is displayed.

5. Enter the name of the field being added. Typically the format is **siebel** followed by the Entity name. For example **siebelAgreement**.

6. Click **OK**. The Add Metadata Field '*field_name*' is displayed.

7. Ensure that the following options are enabled:

   - Placeholder
   - Enable on User Interface
   - Enable for Search Index
   - Enable Option List

8. Modify the Field Caption by adding **ww** to the beginning of the caption and capitalizing Siebel. For example, **siebelAgreement** becomes **wwSiebelAgreement**.
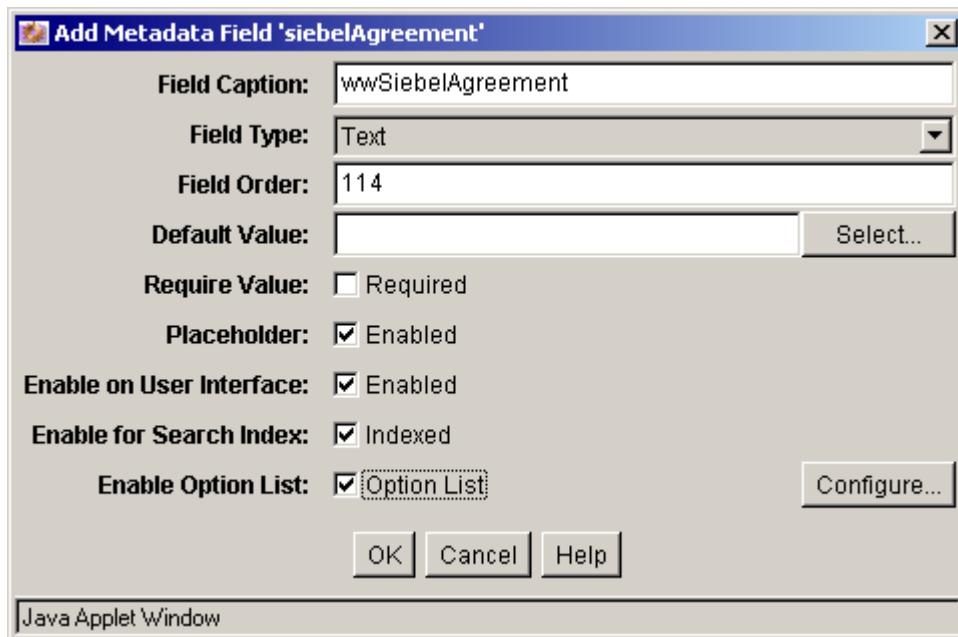
9. Click **Configure**. The Configure Option List for '*field_name*' screen is displayed.

10. Select **Multiselect List** as the **Option List Type**.

11. Enable **Use view** and click **OK**. The Add Metadata Field '*field_name*' screen closes and the Configuration Manager screen is displayed.

B.13.2 Adding Rules for Displaying Fields

To ensure that fields are displayed, you must use Configuration Manager to add rules. To add rules for displaying fields, do the following:

1. With the Configuration Manager screen still displayed, click **Rules**. The Rules tab is displayed.
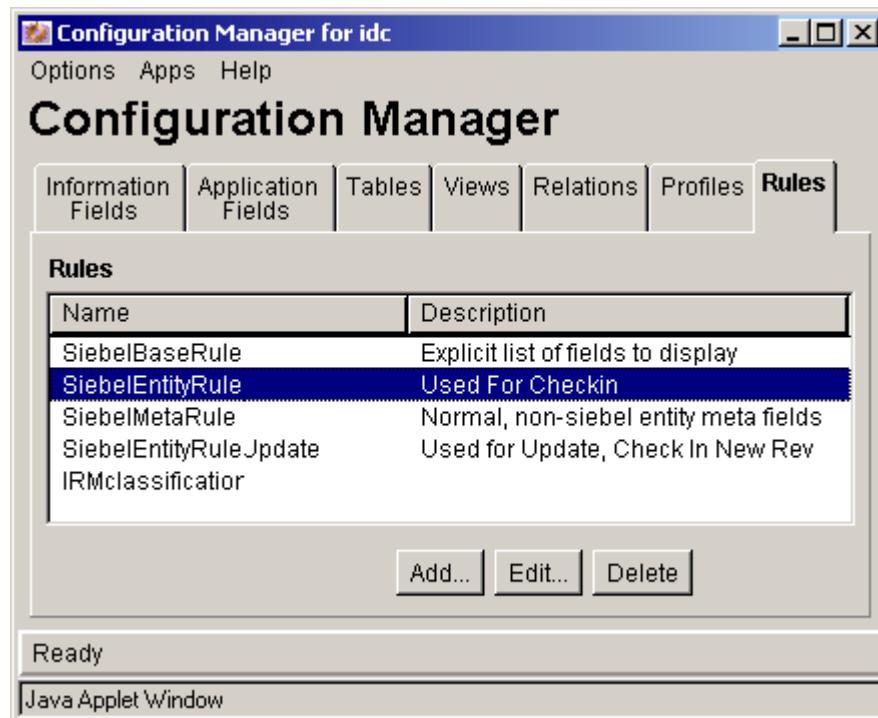
2. Select **SiebelEntityRule** and click **Edit**. The Edit Rule SiebelEntityRule screen is displayed.

3. Click **Fields**. The Fields tab is displayed listing the Entities already built.

4. Click **Add**. The Add Rule Field screen is displayed.

5. Under **Field Name**, select the name of the field you created in Section B.13.1, "Adding Content Server Information Fields." For example, wwSiebelAgreement. The newly created field is typically last on the list.

6. Click **OK**. The Add Rule Field screen closes and the Add Rule Field '*xfieldName*' screen is displayed.

7. Click **OK**. The Add Rule Field '*xfieldName*' screen closes and the Configuration Manager screen is displayed.

8. With the Rules tab displayed, select **SiebelEntityRuleUpdate**.

9. Repeat steps 3 through 7. The relevant fields are now added and displayed.

10. Click **OK** to close the Configuration Manager screen.

B.13.3 Editing Necessary Content Server Resource and String Files

After adding the information fields to Content Server, you must account for them in the Content Server integ_cfg_tables.htm and ww_strings.htm files. Do the following steps:

1. Open the integ_cfg_tables.htm file in a standard text editor. The integ_cfg_tables.htm file is located in the following directory:
   content_server_install_dir/custom/SiebelEcmIntegration/resources

2. Add a row to the end of the **DocTagDefList** table with a cell for the field name entered in step 5 of Section B.13.2, "Adding Rules for Displaying Fields" and the field caption entered in step 8 of the same section. For example:

```
<tr>
    <td>xsiebelAgreement</td>
    <td>wwSiebelAgreement</td>
</tr>
```

3. Open the ww_strings.htm file in a standard text editor. The ww_strings.htm file is located in the following directory:
   content_server_install_dir/custom/SiebelEcmIntegration/resources/lang/en

   > **Note:** Only the ww_strings.htm file in the *content_server_install_ dir*/custom/SiebelEcmIntegration/resources/lang/en directory needs to be edited. The change will modify the ww_strings.htm files in the other language directories automatically.

4. Add the field caption information added in 8 of Section B.13.2, "Adding Rules for Displaying Fields" to the end of the body section. For example:

   ```
   <@wwSiebelAgreement=Agreement@>
   ```

   > **Note:** Agreement was the Siebel Entity added as an example in this appendix. Ensure that you use the name of the Entity that you added.

5. Restart Content Server. The new Entity is enabled.

```
       integ_cfg_tables.htm        ww_strings.htm

  1    <html>
  2    <head>
  3     <meta http-equiv="Content-Type" content="tex
  4    <title>
  5     SiebelEcmIntegration htmlIncludeOrString
  6    </title>
  7    </head>
  8    <body>
  9    <@wwSiebelContact=Contact@>
 10    <@wwSiebelAcct=Account@>
 11    <@wwSiebelCallRpt=Call Report@>
 12    <@wwSiebelOpprnty=Opportunity@>
 13    <@wwSiebelOrder=Order@>
 14    <@wwSiebelSvcReq=Service Request@>
 15    <@wwSiebelAsset=Asset@>
 16    <@wwSiebelQuote=Quote@>
 17    <@wwSiebelClaim=Claim@>
 18    <@wwSiebelCase=Case@>
 19    <@wwSiebelIncident=Incident@>
 20    <@wwSiebelArrest=Arrest@>
 21    <@wwSiebelOffense=Offense@>
 22    <@wwSiebelEvidence=Evidence@>
 23    <@wwSiebelLead=Lead@>
 24    <@wwSiebelGroup=Group@>
 25    <@wwSiebelGroupSpct=Group Suspect@>
 26    <@wwSiebelAgreement=Agreement@>
 27    </body></html>
 28
```

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