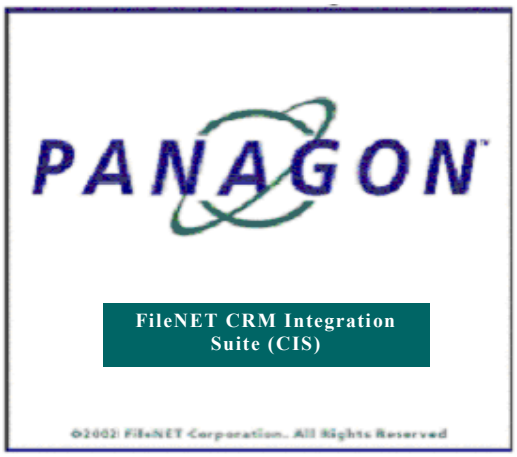

FileNET CRM Integration Suite

Installation and Configuration Manual

Release 3.0

October 2002

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Please take a few moments to read the License Agreement in “Appendix B –Software License Agreement” Page 134. By installing the **Panagon softwar**e, the customer agrees to be bound by the terms of this agreement.

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About this Manual

This manual provides information about installing and configuring **C**RM **I**ntegration **S**uite 3.0 product.

Conventions Used in this Document

Education

FileNET provides various forms of instruction. Please visit the Global Learning Services in FileNET's Service & Support area at www.filenet.com.

Comments and Suggestions

FileNET invites all customers to communicate with the Documentation group on any question or comment related to FileNET manuals and online help. Fax, phone, mail, or email any question or comment to Mike Calvert at one of the numbers or addresses listed below. We guarantee a response to each communication within one week. Your suggestions help us improve the products we deliver.

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1
Before You Install

This Installation and configuration manual describes procedures for installing and configuring CIS 3.0 application.

Prior to beginning the installation, we recommend that you:

- Read all overview information, installation procedures and configuration procedures. Setting up CIS 3.0 system is a multi-part process; you should understand the steps required before beginning the procedures.
  - "CIS 3.0 an Overview"
  - "Overview of the Installation Process"
  - "Application Configuration"
  - "Appendix A – Single Sign-on, Delete All Links functionality
  - "Appendix B – License agreement
  - Read the Release Notes. You can find the release notes on the FileNET website at http://www.css.filenet.com.
- Be prepared to reference additional documents as needed. For example, any further detail about Siebel can be found from Siebel Bookshelf and details about Open Client can be found from the documentation provided with the open client.

CIS 3.0 an Overview

FileNET CIS 3.0 application is a set of integration modules that enables Siebel users to seamlessly store and access documents stored in the FileNET Panagon IDM repositories.

CIS 3.0 application interacts with the following servers

Siebel Server

Siebel server hosts Siebel 7.0.4.23 Enterprise Server installation and all CIS custom objects for Siebel. Open Client and Siebel Enterprise Server may be installed on same Hardware server. CIS custom Siebel objects provide interface to CIS application and are deployed on the machine during CIS 3.0 installation

Open Client Server

This server hosts FileNET Open Client GA release installation and all CIS web pages, assemblies and DLLs. These CIS files are deployed on this machine during CIS 3.0 installation. Open Client server must have Siebel dedicated web client installation.

Note For Siebel 7.0.4 dedicated web client installation and Open client GA release installation, refer to Siebel Bookshelf and Open Client documentation respectively.

IS / CS Servers

CIS application interacts with Image Services and Content services through FileNET Open Client application for storing and retrieving stored documents.

User Workstations

Siebel user accesses CIS 3.0 application from workstation through Siebel client interface using Internet explorer browser.

Refer to Siebel bookshelf for IE versions supported by Siebel.

Warning	**CIS application will stop working if Open client is uninstalled. Uninstall CIS before uninstalling Open Client.**

CIS 3.0 Tools

CIS 3.0 suite comes along with following two helper tools:

CIS 3.0 Configuration Tool – This tool is used for configuring CIS 3.0 application and Database.

CIS 3.0 Migration Tool- This tool is used for migrating data from CIS 2.1 database to CIS 3.0 database**.**

System Prerequisites

All systems must meet the hardware, software and (as necessary) configuration requirements described in the following sections.

CIS 3.0 installation requires pre-installed

- **FileNET Open Client server**
- **Siebel Enterprise server**

Note:	Siebel Enterprise server and FileNET Open Client Server may co-exist on the same Hardware & IIS server.

Hardware / Software requirements for CIS application are as follows

CIS 3.0 Application

Hardware

- P-IV machine 1.5 Ghz class processor & above
- 1.5 GB disk space
- Minimum 512 MB RAM (1 GB RAM recommended)

Software

- Windows 2000 Server with service Pack 2
- Internet Information Server 5.5
- Siebel 7.0.4.23 Enterprise server
- Siebel 7.0.4 dedicated Client
- IDM Web Services 3.2

- .NET Framework
- Open Client GA release
- SQL Server 2000 Client or Oracle 8i Client

Warning	**It is recommended to install the software in the sequence mentioned above.**

CIS 3.0 Database

Hardware

- Min 100 MB disk Space

Software

- SQL Server 2000 or Oracle 8i Database

Note	Open Client server and Siebel Enterprise server must have connectivity to CIS 3.0 database.

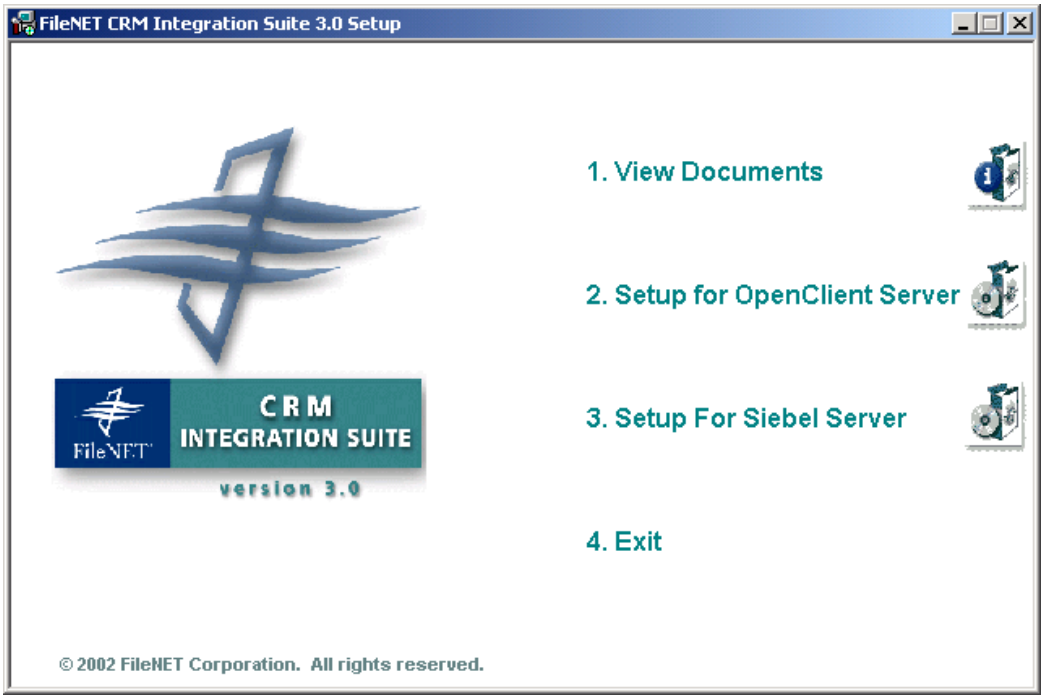
2
Installation

This chapter provides information, instruction and guidelines for installing CIS3.0 application.

Installing CIS3.0 application

Launch setup.exe to install CIS3.0 application, following screen will appear:

Note: Ensure IIS is shutdown before executing CIS 3.0 set-up program to ensure proper installation, update and un-installation.



There are 4 options provided on the splash screen. These options are as follows:

1. **View Documents** - This option facilitates user to view all CIS 3.0 documents. There are 3 documents provided with this CIS release viz. Installation Guide, Operations manual and Readme file.
2. **Setup for Open Client** – Select **Setup for Open Client** to install CIS components on Open Client Server. This setup program checks whether FileNET Open client is installed on

the machine. If it does not exist, CIS3.0 installation process exits.

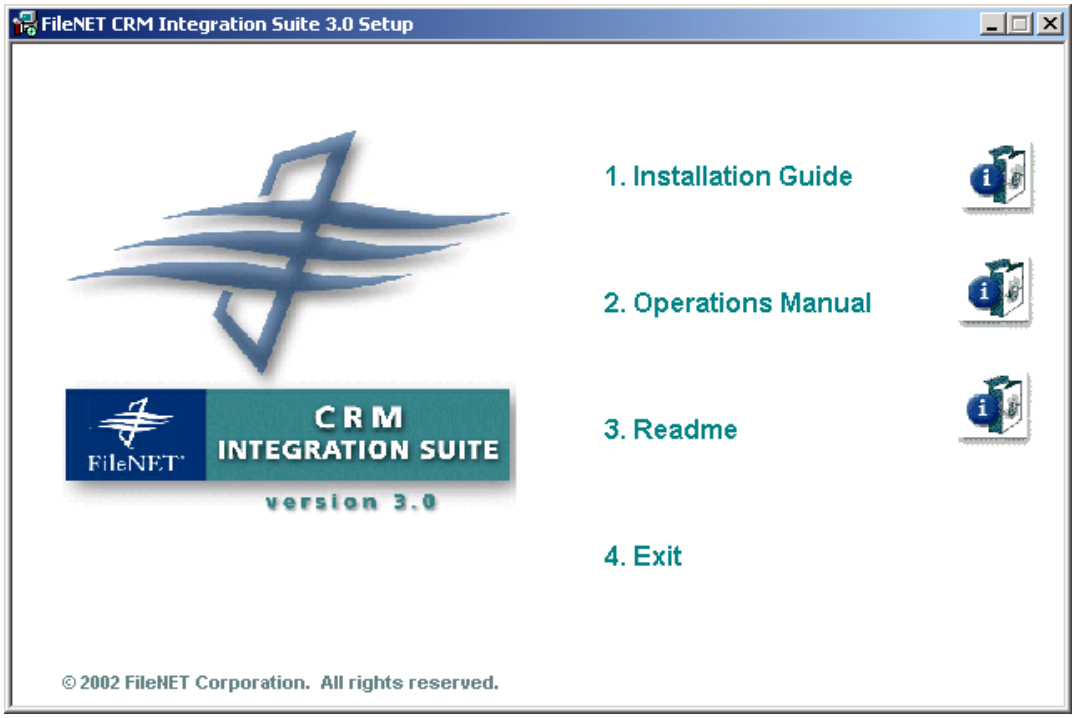
3. **Setup for Siebel Server** – Select **Setup for Siebel Server** to install CIS components on Siebel server.

Note	CIS 3.0 installation is two-step process that includes CIS3.0 components installation on Open Client Server and Siebel Server machine. This process facilitates CIS 3.0 application installation on a separate hardware other than the Siebel Server m/c.

4. Click on **Exit** button to exit from the setup program

View Documents

Click on **View Documents**, following screen will appear.

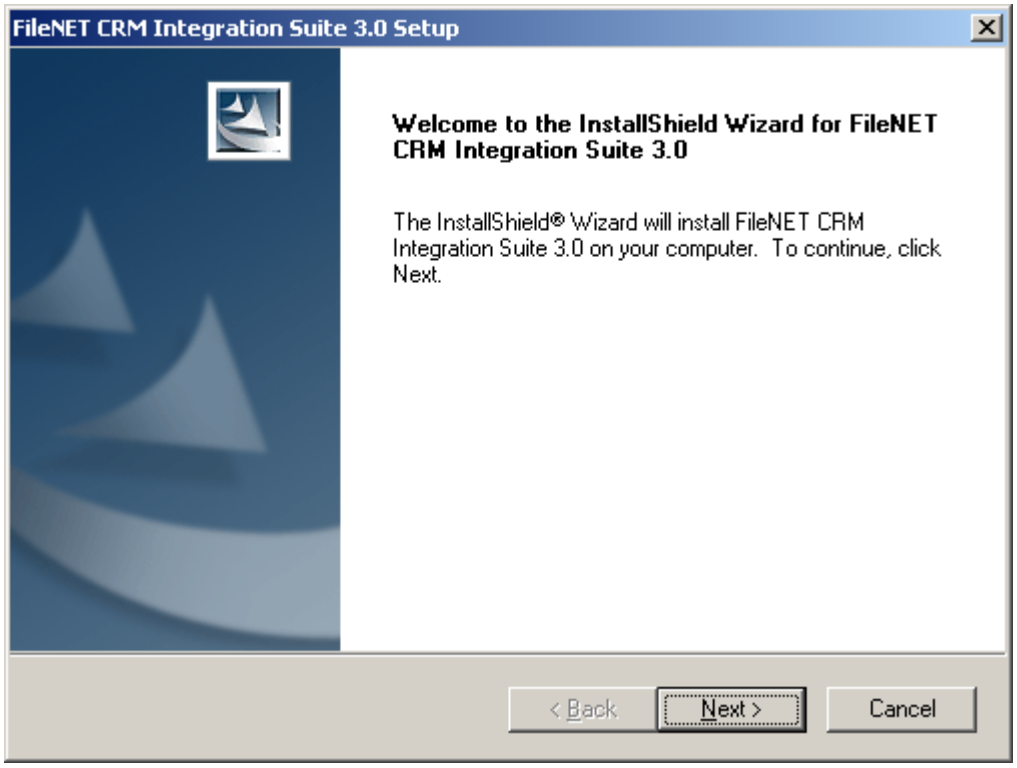


Click on appropriate option to view documents. To view all CIS3.0 documents **Acrobat Reader** must be installed on the system.

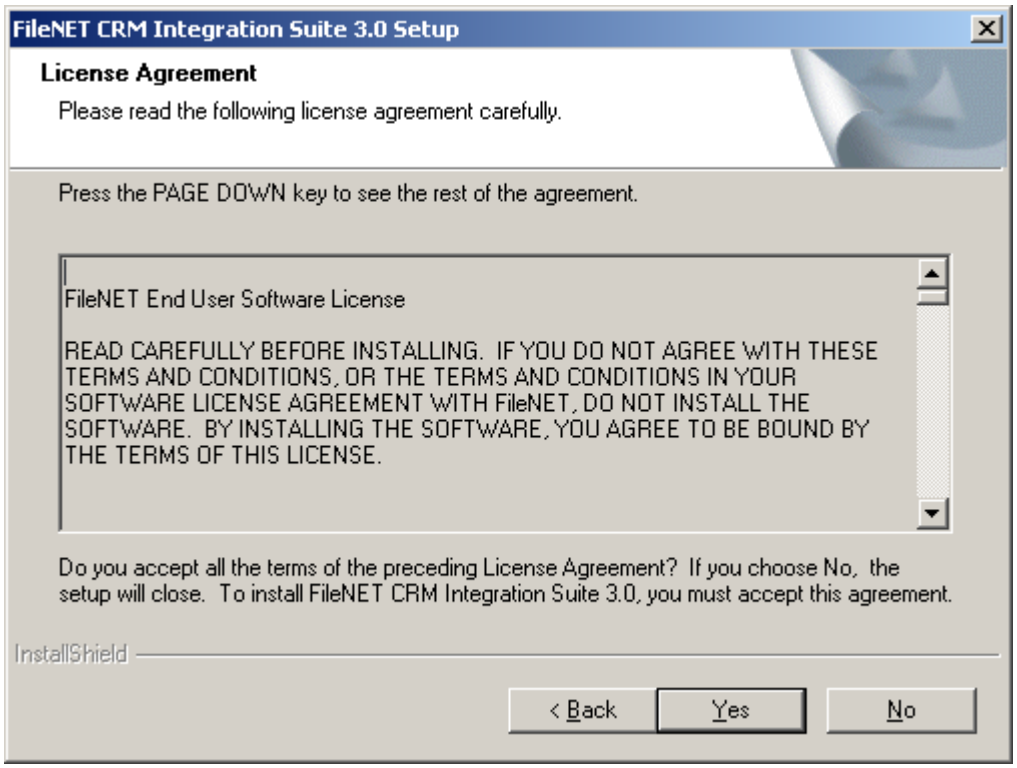
Click on **Exit** to go back to the previous screen.

Setup for Open Client

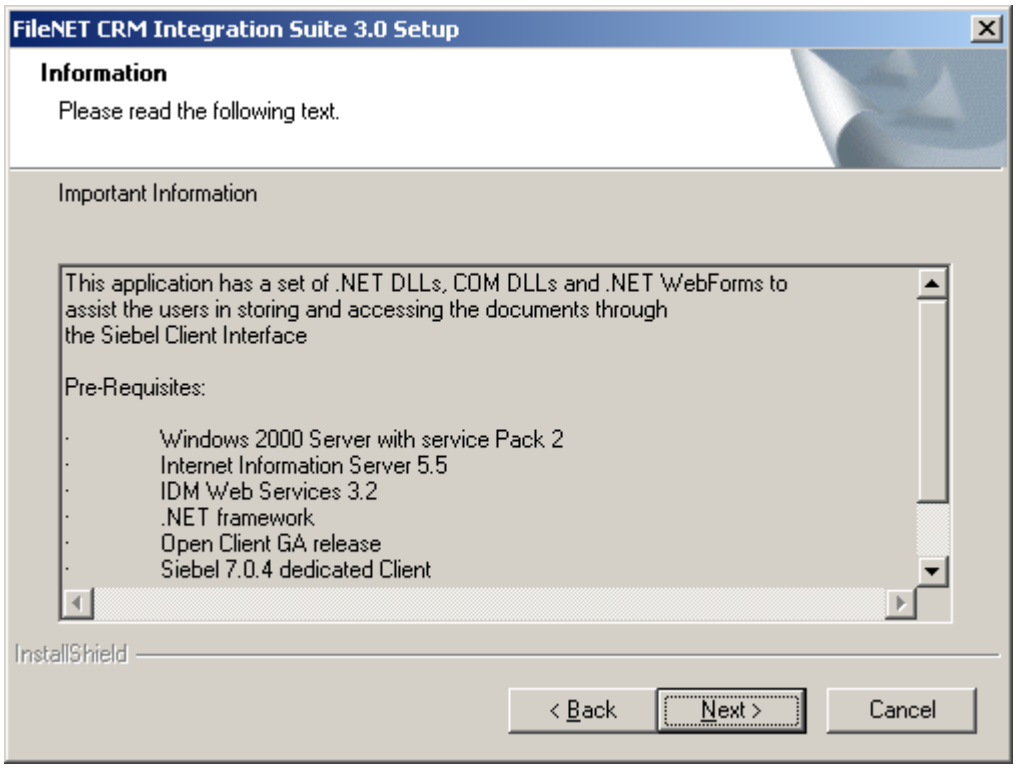
To install CIS components on Open Client server, click on **Setup for Open Client**. On selection of this option following screen will appear



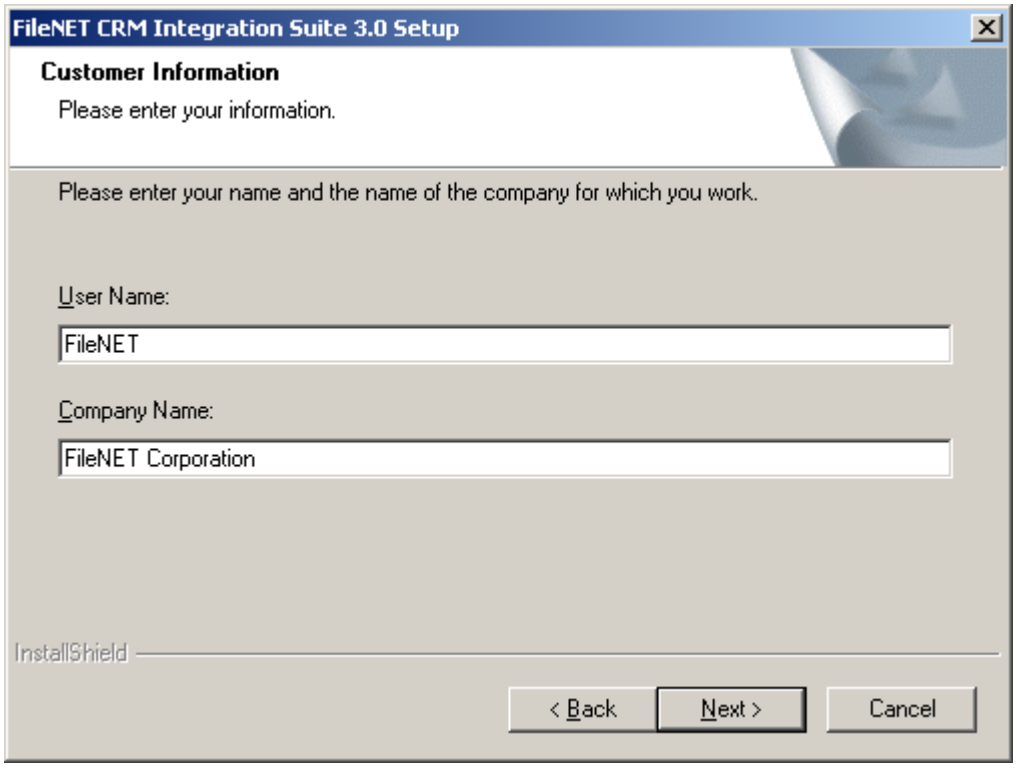
To continue, click on **Next** button. Following screen will appear



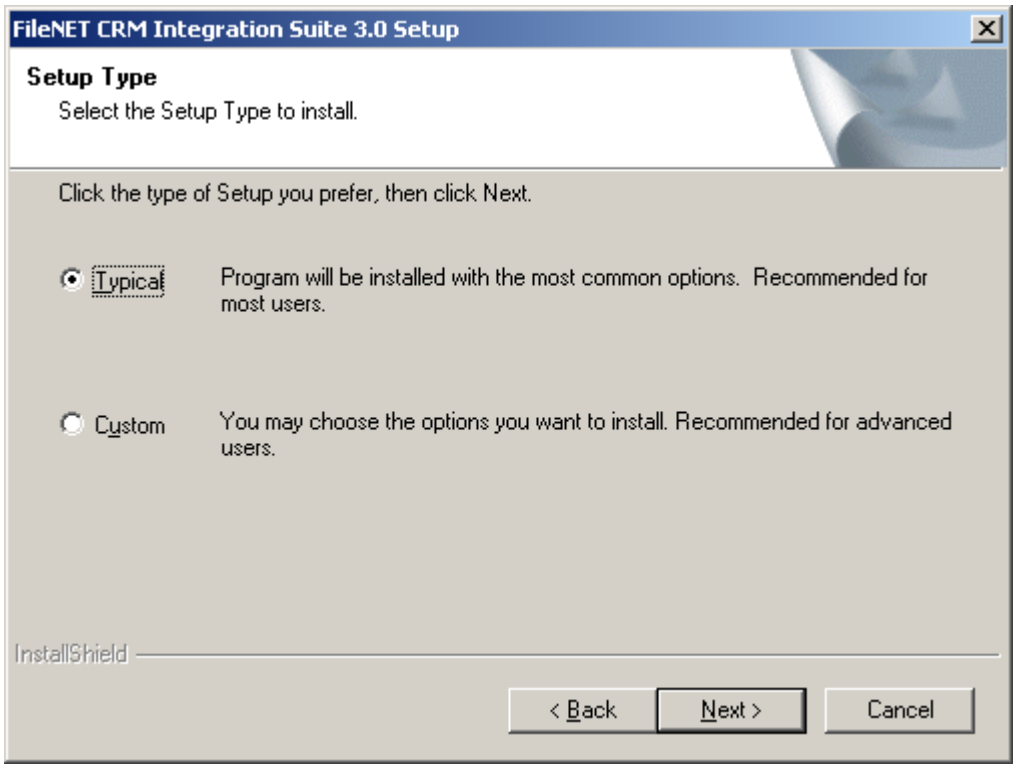
To accept the License agreement, click on **Yes** button. Following screen will appear.



To continue, click on **Next** button. Following screen will appear



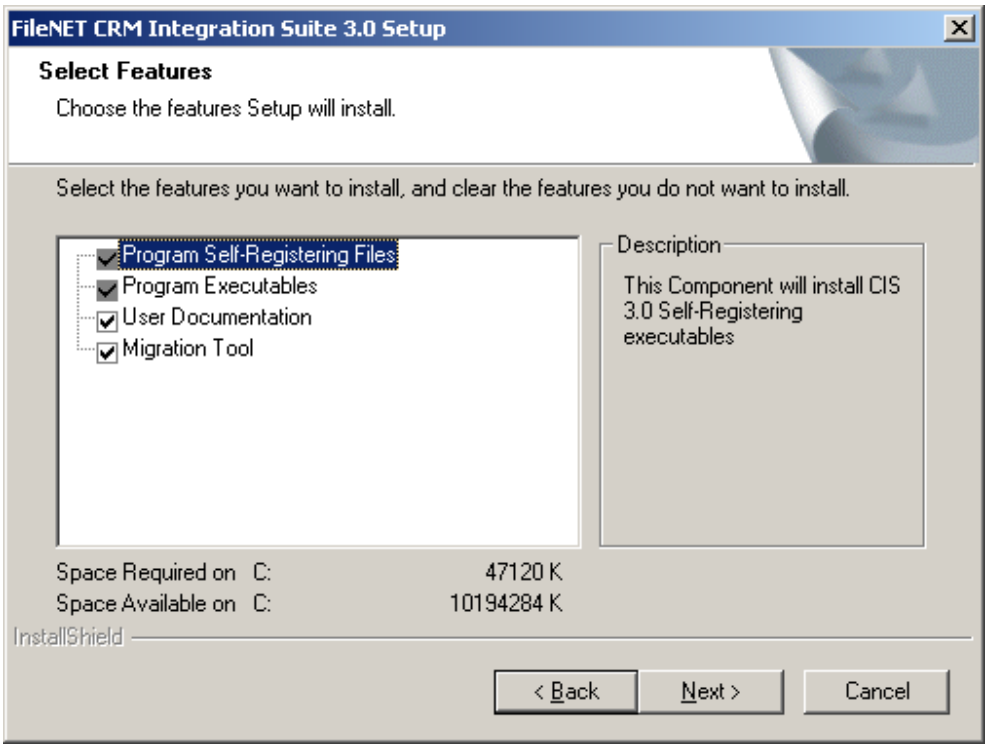
Enter Customer Information i.e. User name and Company Name. To continue, click on **Next** button. Following screen will appear



Choose CIS 3.0 set-up type. To continue, click on **Next** button. Following screen will appear

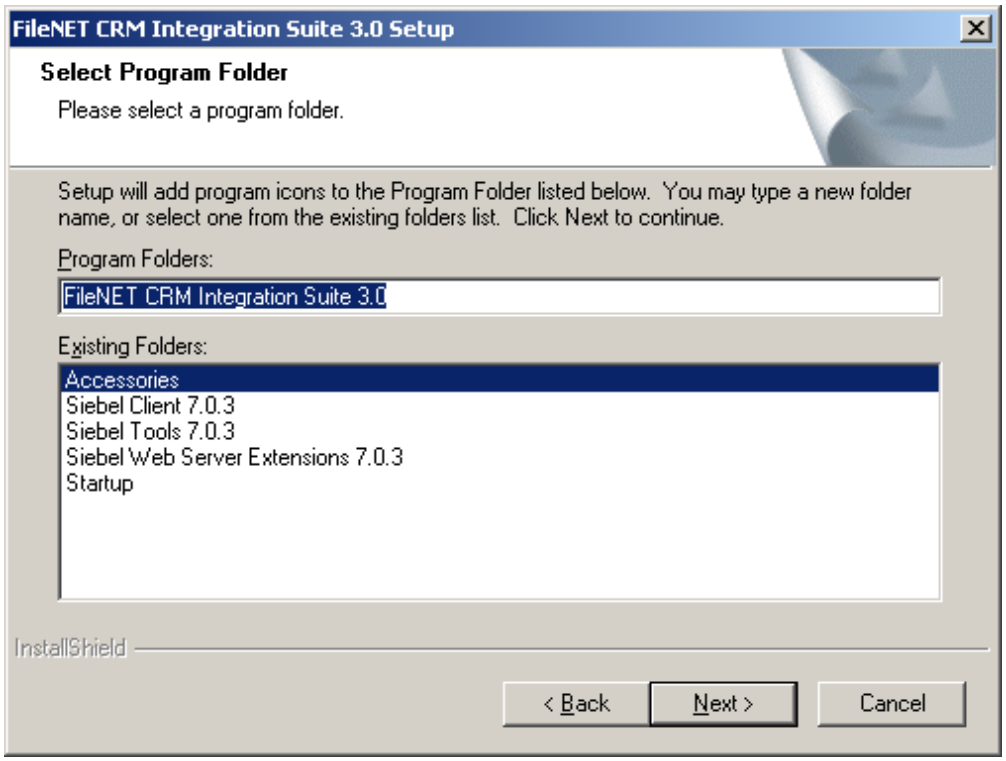
Typical Choose this setup type to install all CIS 3.0 components with most common options. This option skips installation of user documentation for CIS3.0 and Acrobat Reader.

Custom This setup option lets you customize your installation by choosing the specific components you want to install.



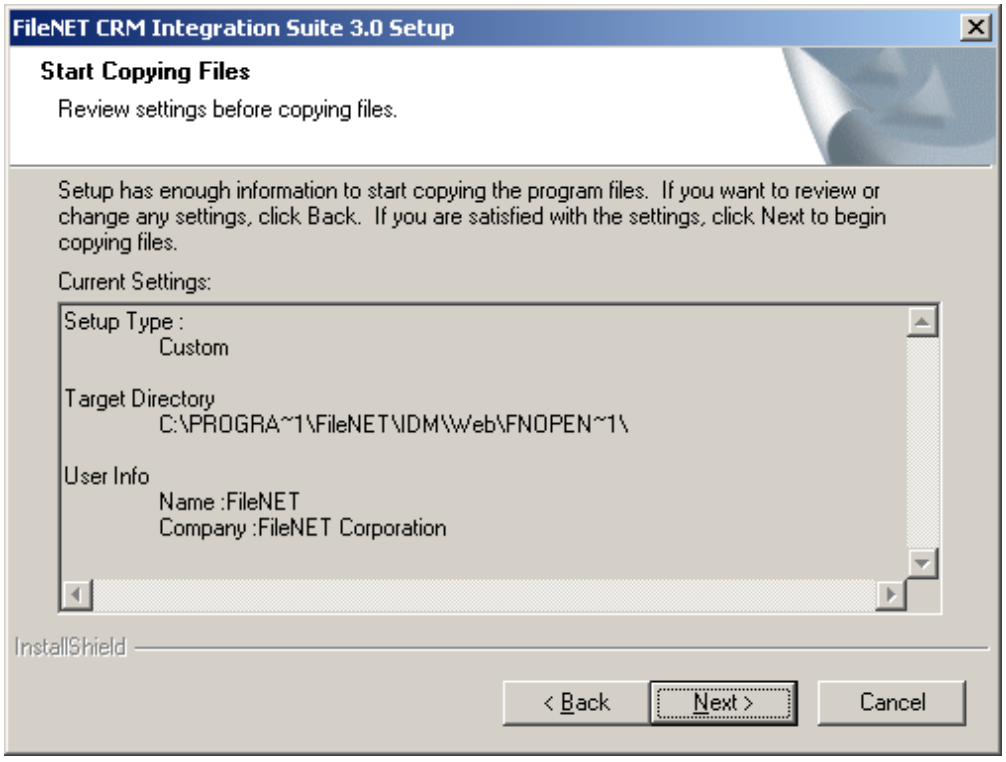
Select the features to be installed in CIS 3.0 setup. To continue, click on **Next** button. Following screen will appear

Note	This screen will appear only if Custom set-up type is chosen in the previous screen. For Typical set-up type, skip to next screen.



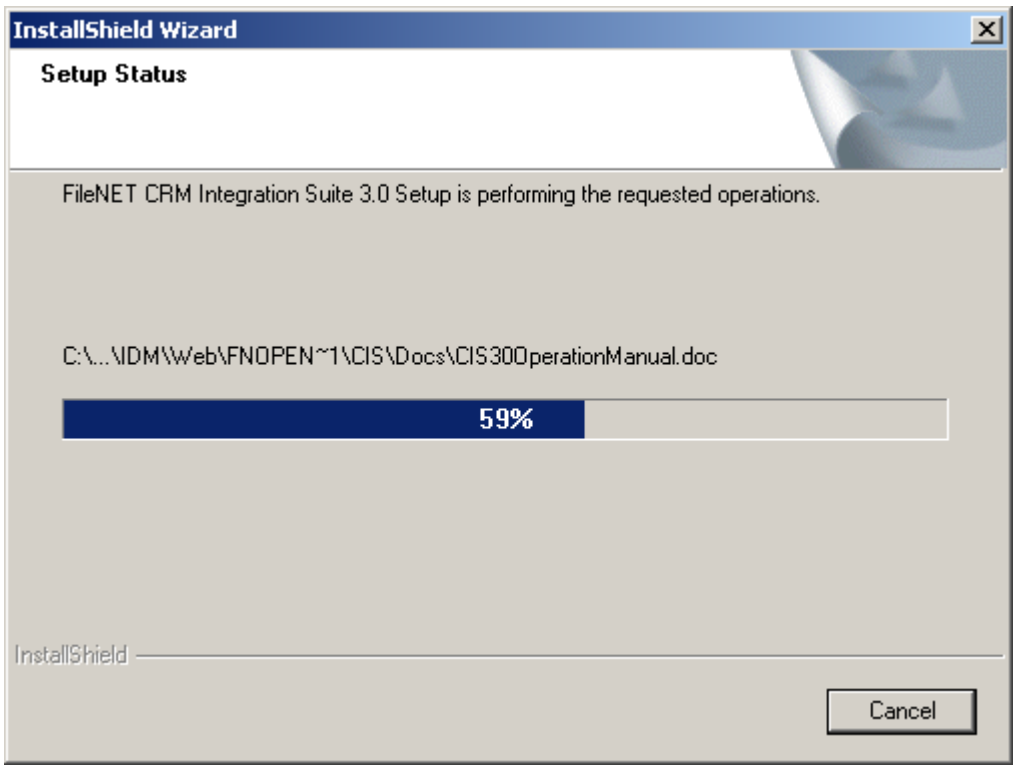
Enter the Folder name for CIS3.0 application. CIS 3.0 application will appear with this name under Program Files folder of windows. Default folder name given is 'FileNET CRM integration Suite 3.0'.

To continue click on **Next** button, following screen will appear



Verify the information provided in the previous screen. Click on **Back** button to modify the information.

To continue, click on **Next** button. Following screen will appear



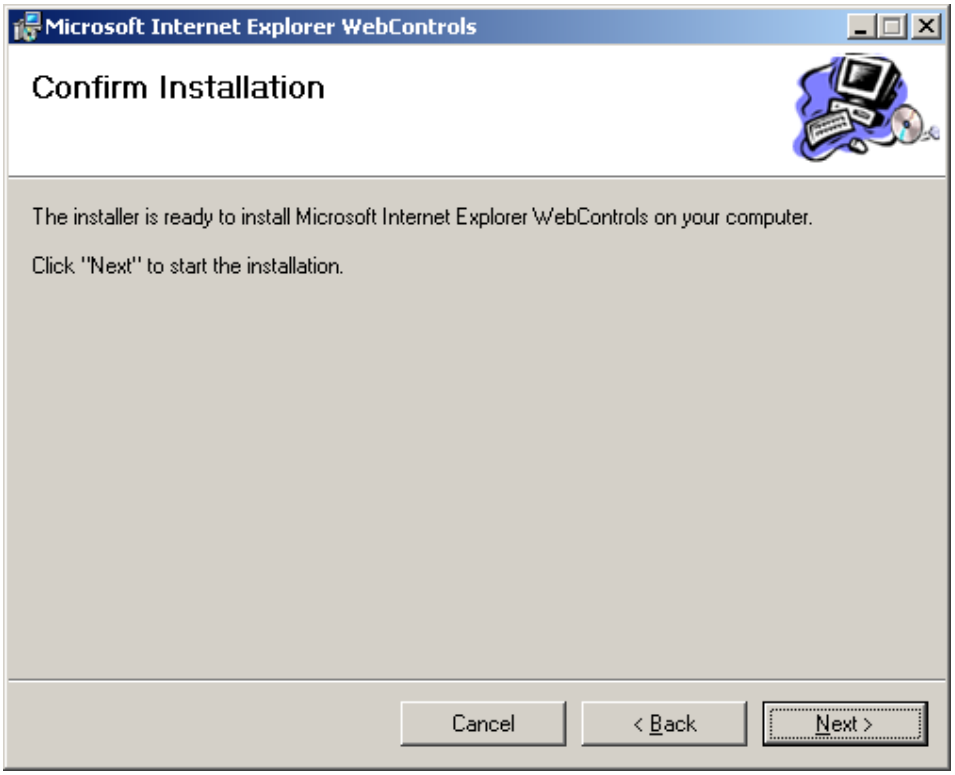
This screen will be followed by Microsoft Internet Explorer WebControls Setup screen.

Note:	This setup wizard will appear only if Microsoft Internet Explorer WebControls is not installed on the installation machine.

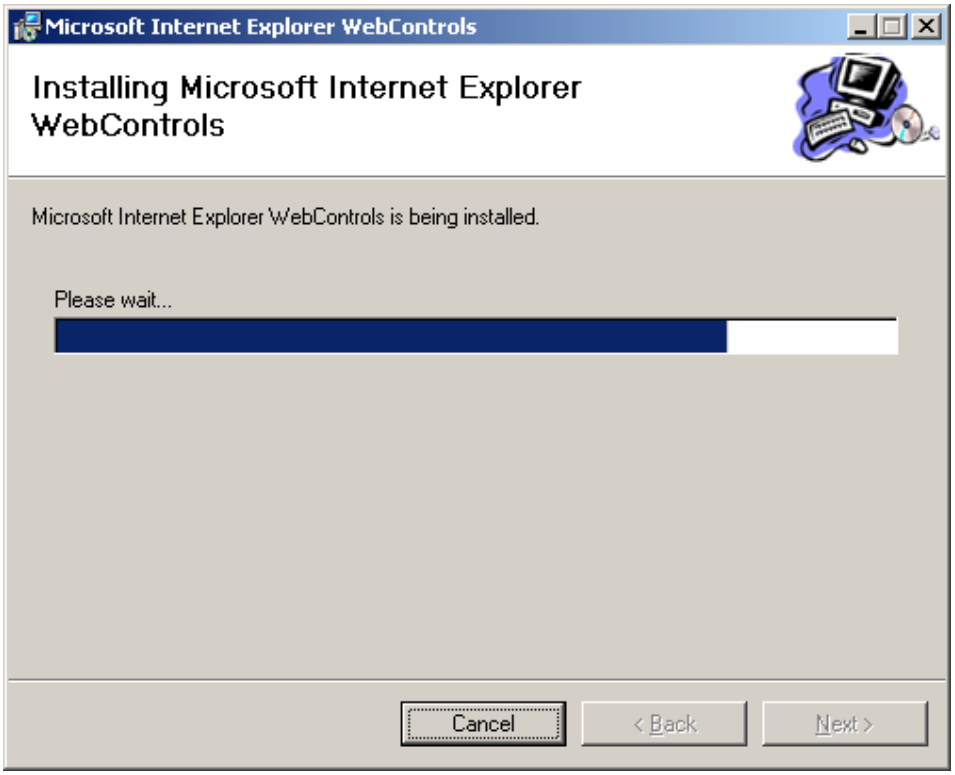
To proceed, click on **Next** Button. Following Screen will appear.

Accept License Agreement and click on **Next** button. Following screen will appear. To cancel the setup, click on **Cancel** button.

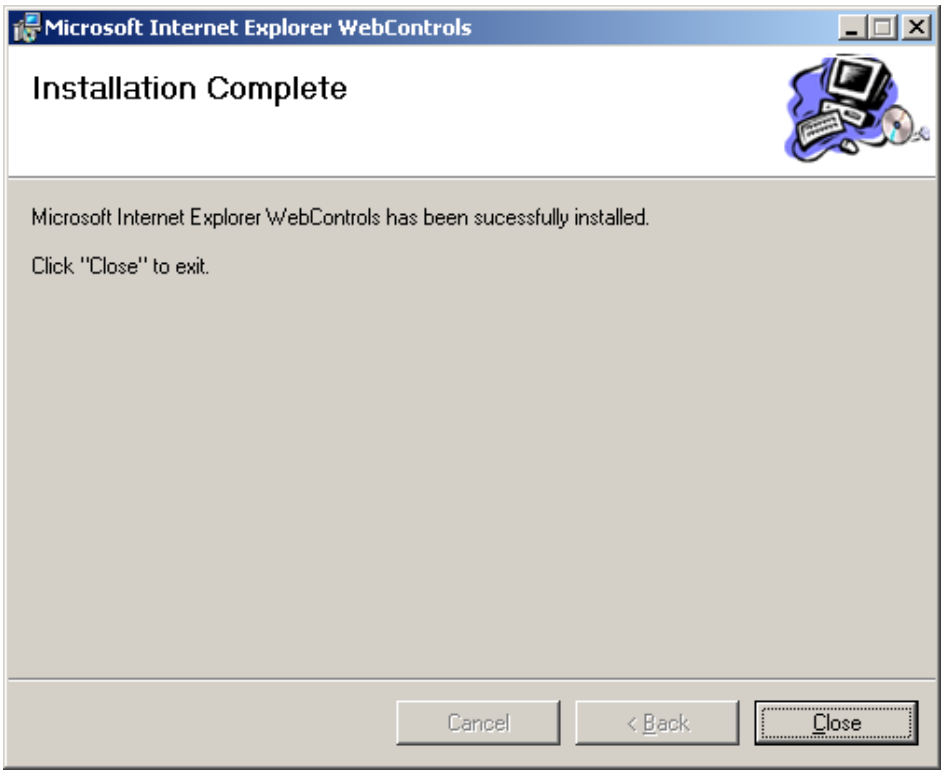
Note: For successful installation of CIS 3.0, install Microsoft Internet Explorer Web Controls version 1.0



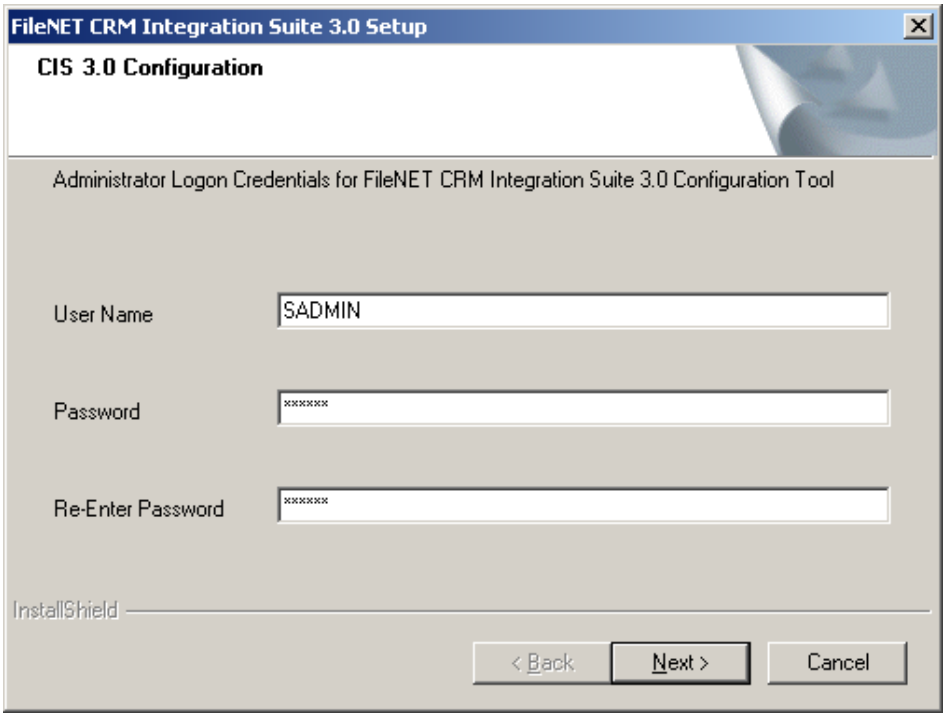
To start the installation, click on **Next** button. Following screen appears.



This screen will be followed by installation completion screen.



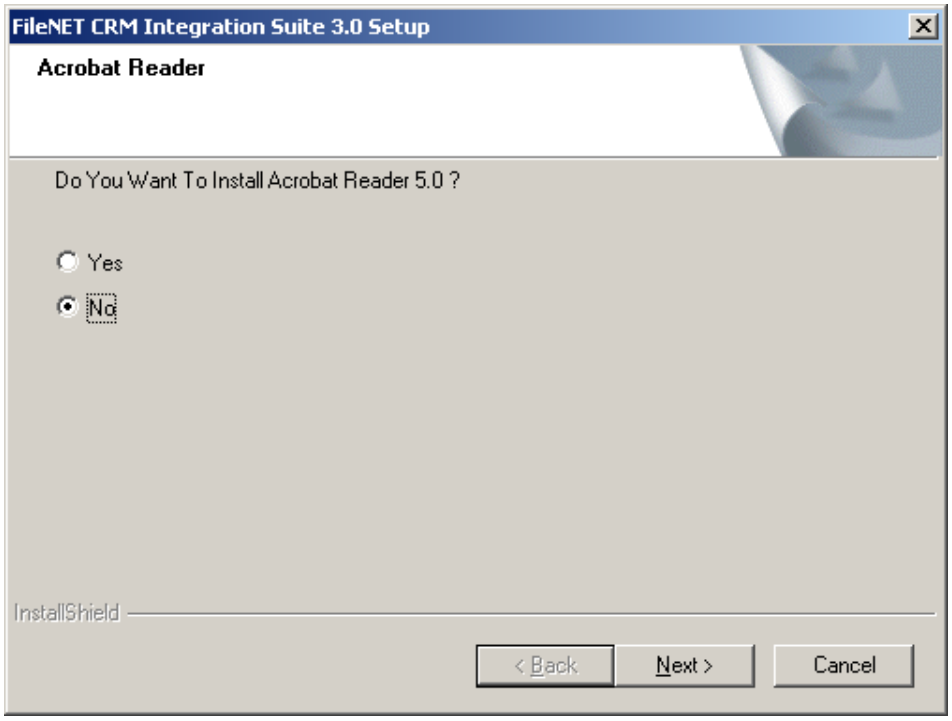
Click on **Close** button. This ends the installation of Microsoft Internet Explorer WebControls. CIS 3.0 Configuration screen will appear.



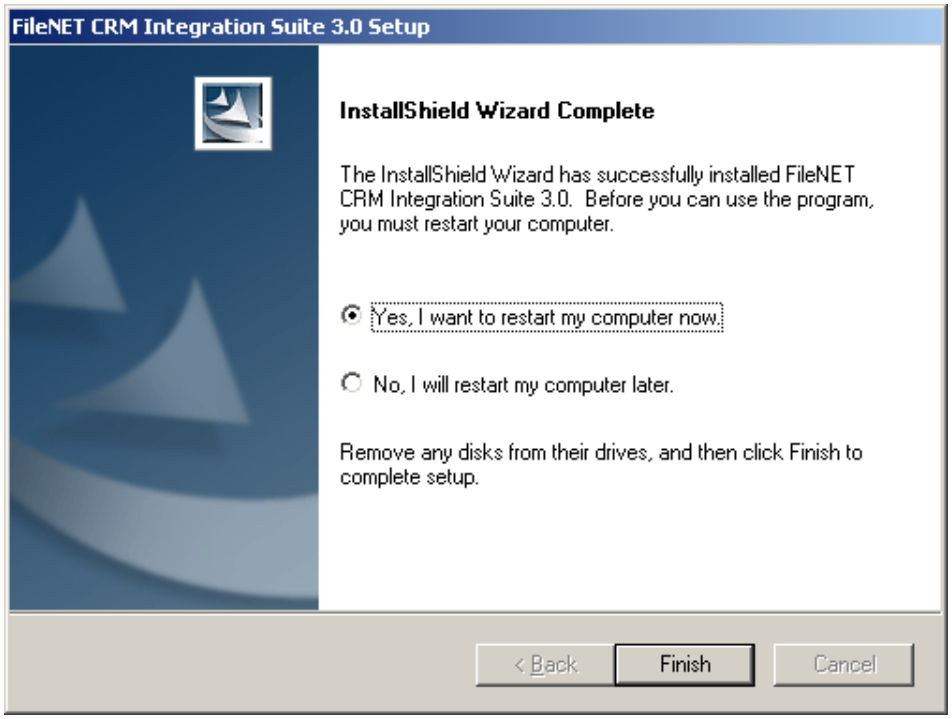
Enter administrator logon credential i.e. User Name and Password for CIS 3.0 configuration tool.

Note These credentials will be required to logon to configuration tool.

To continue, click on **Next** button. Acrobat Reader installation screen will appear.



Select appropriate option. To continue, click on **Next** button. Following screen will appear

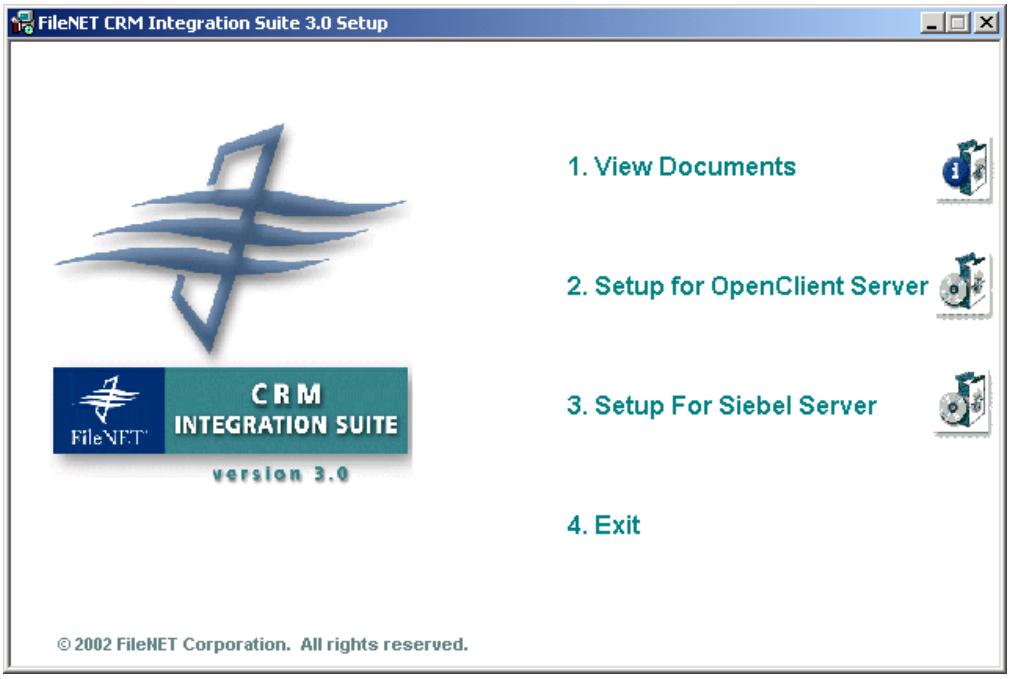


Select restart option and click on **Finish** button. The server is rebooted.

Note	Server must be restarted after successful installation.
Note	Create CIS 3.0 Database before proceeding further. CIS 3.0 Database creation steps are provided in Creating CIS 3.0 Database chapter.

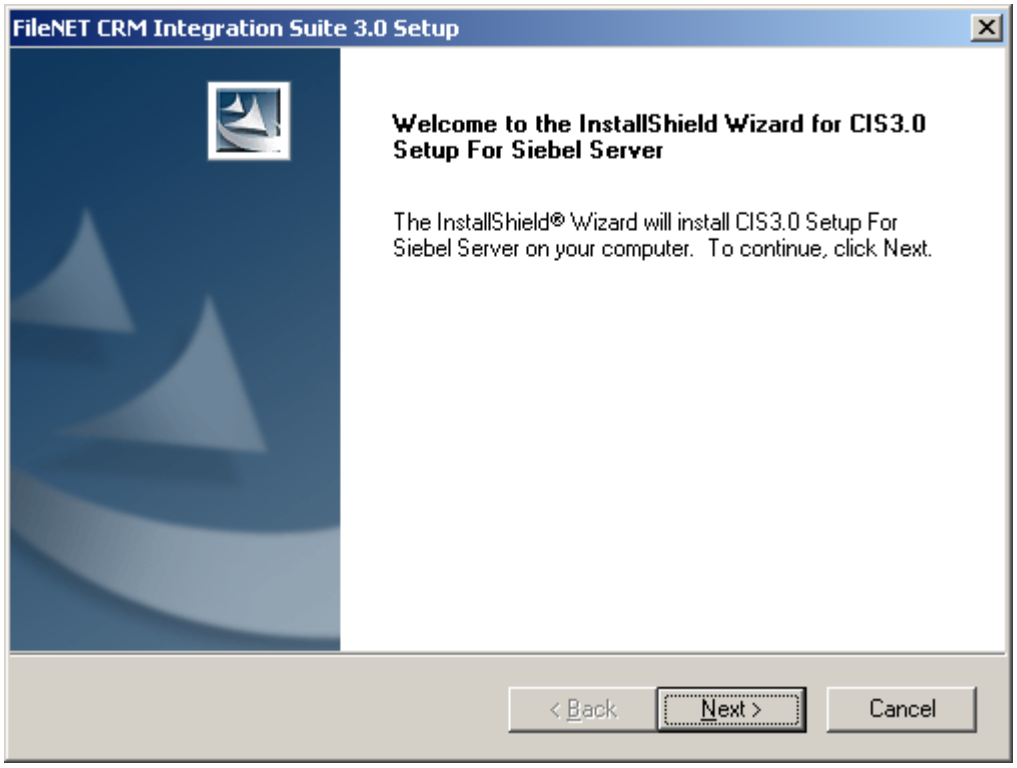
Setup for Siebel

Launch setup.exe on Siebel Server machine, Following screen will appear:

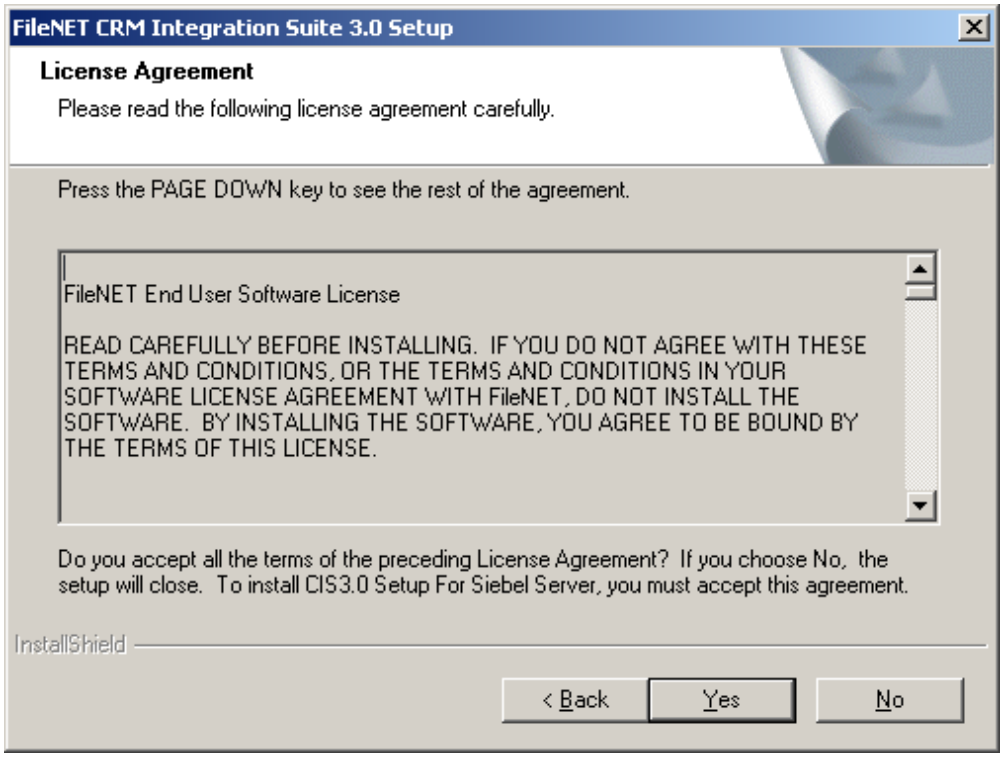


To install CIS setup for Siebel Server, click on **Setup for Siebel Server**.

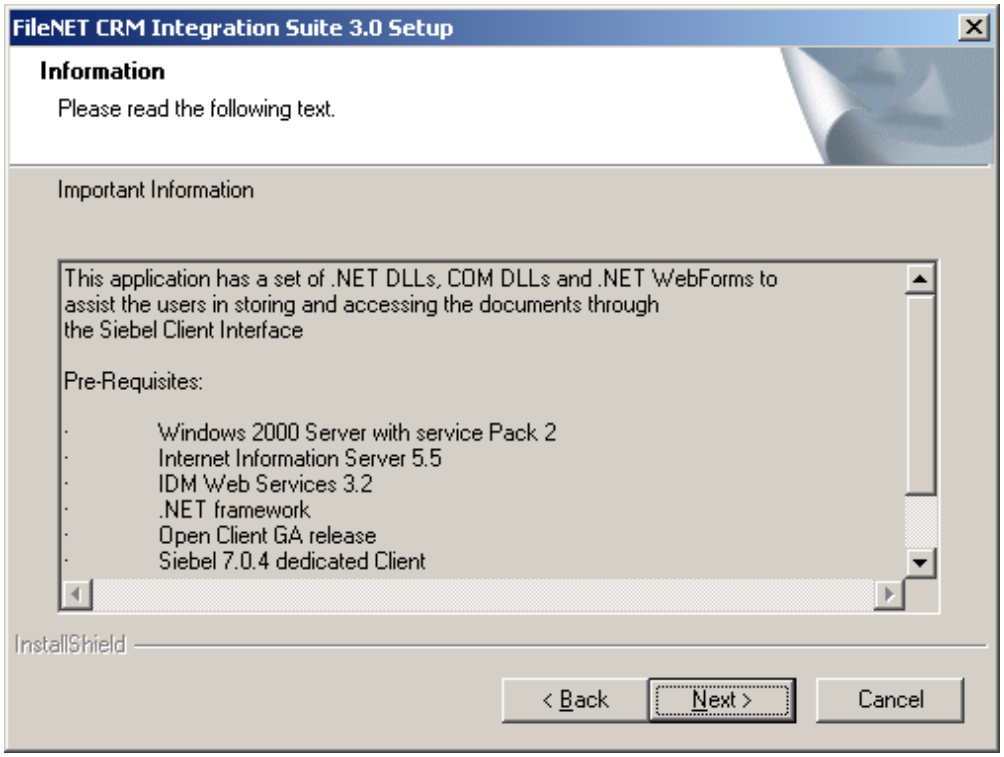
On selection of this option following screen will appear



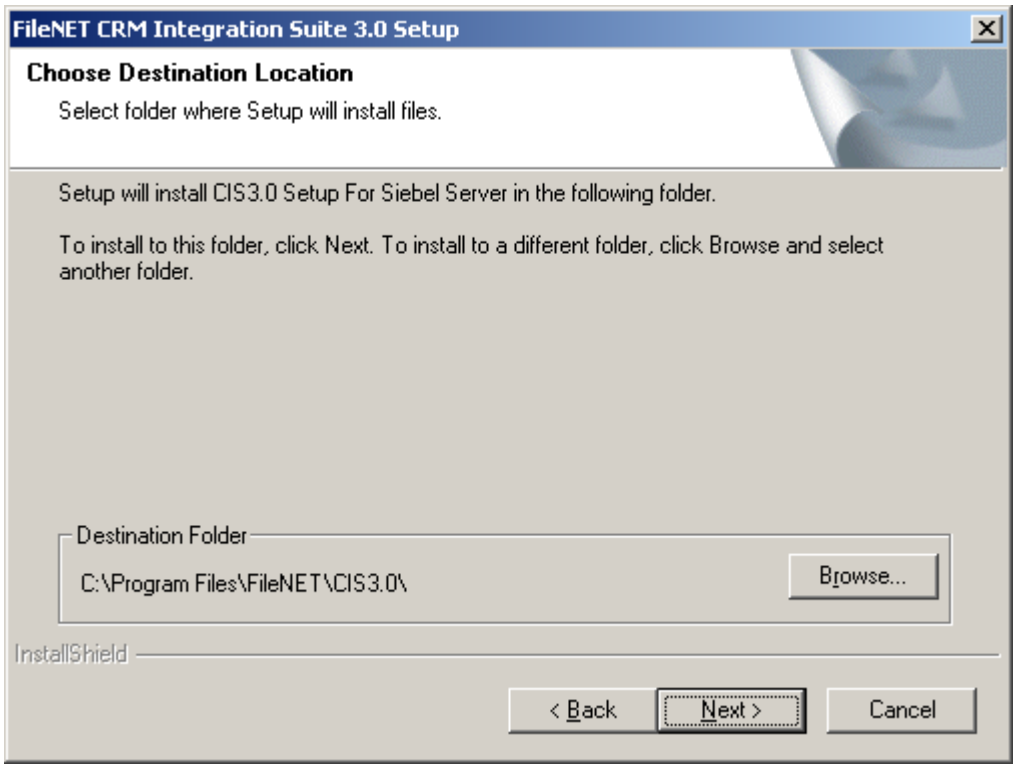
To continue, click on **Next** Button. Following screen will appear



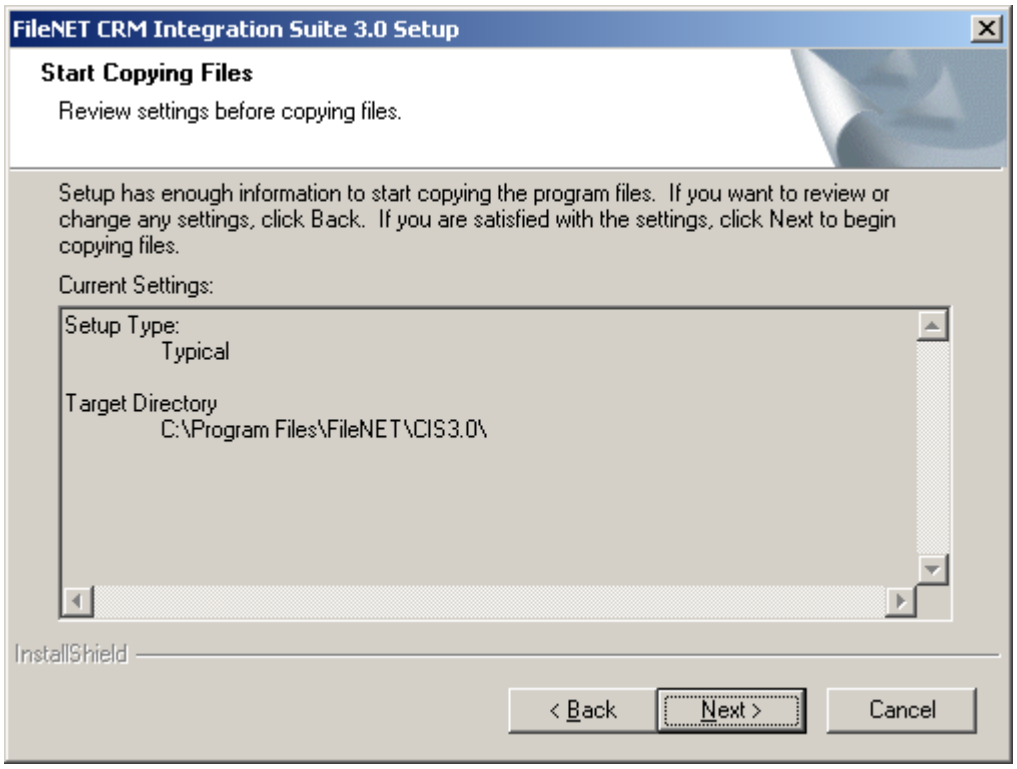
To accept the License agreement, click on **Yes** button. Following screen will appear.



To continue, click on **Next** button**.** Following screen will appear

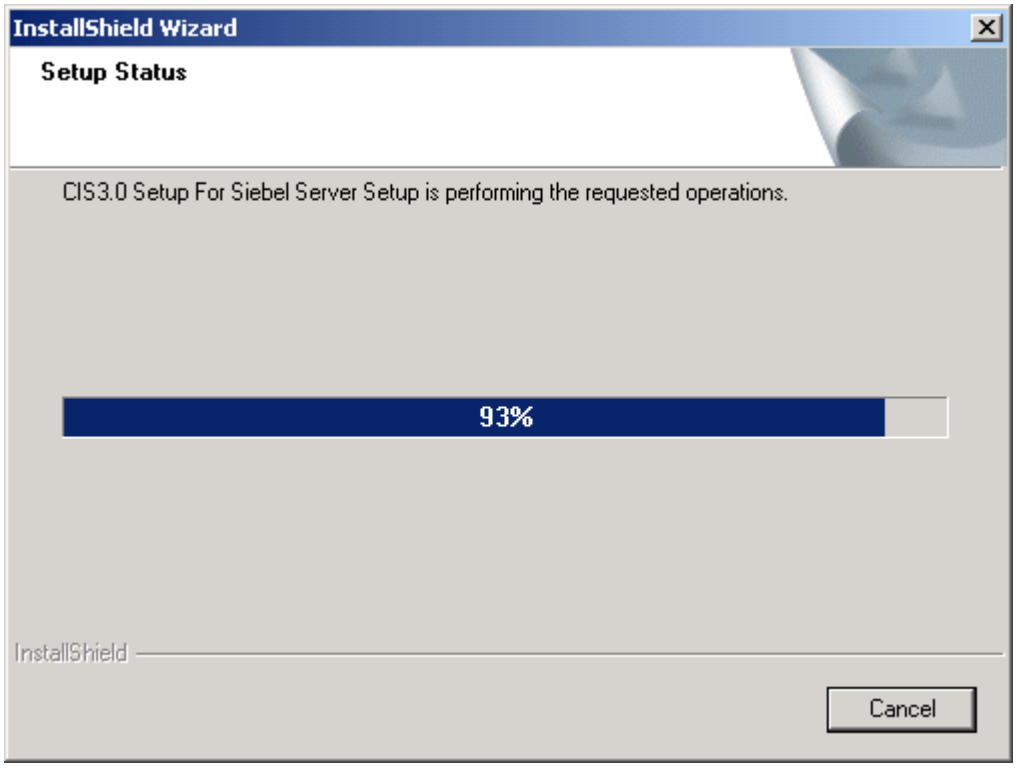


Click on **Browse** button to select appropriate destination folder. To continue, click on **Next** button. Following screen will appear

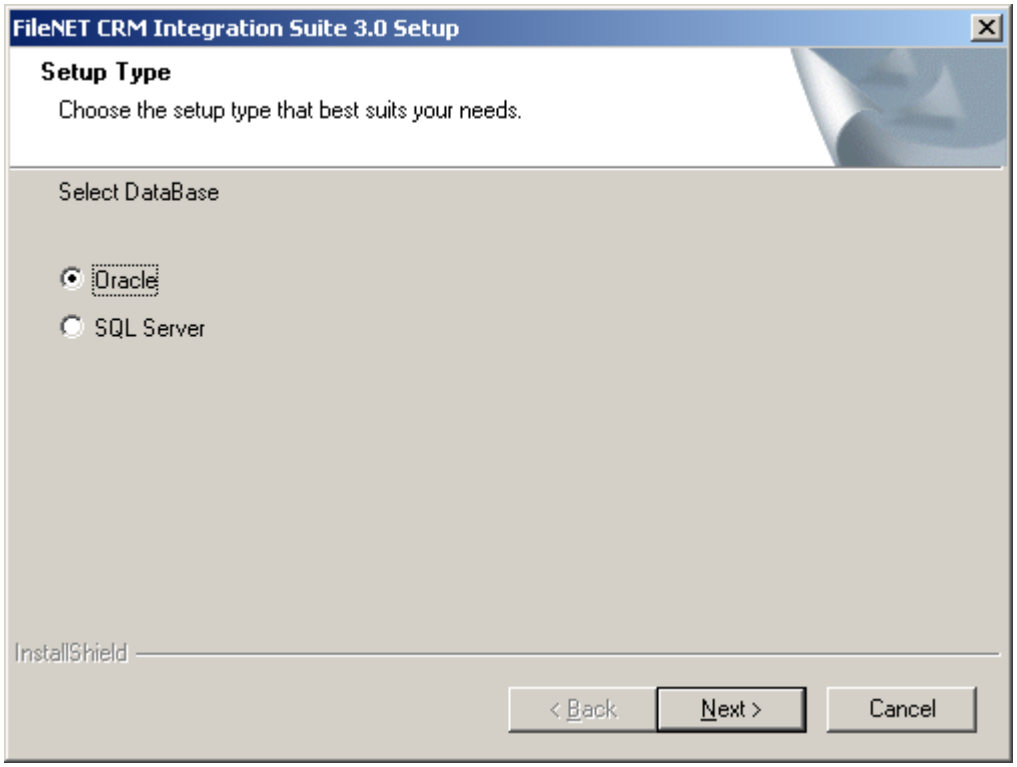


Verify the information provided in the previous screen. Click on **Back** button to modify the information.

To continue, click on **Next** button. Following screen will appear

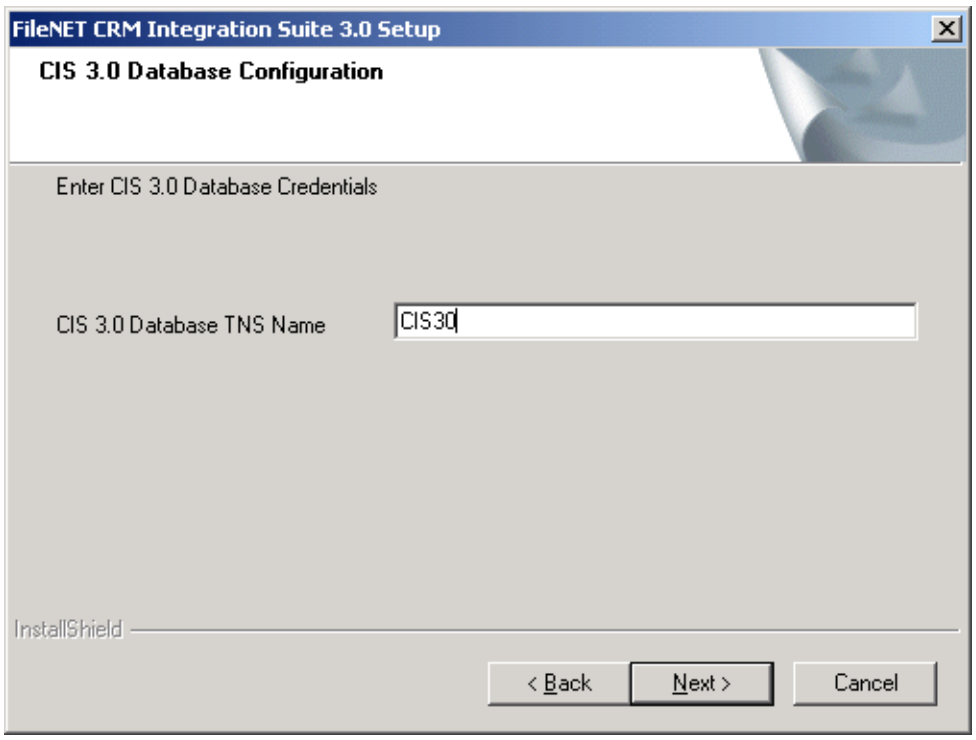


This screen is followed by CIS 3.0 database Configuration screen.



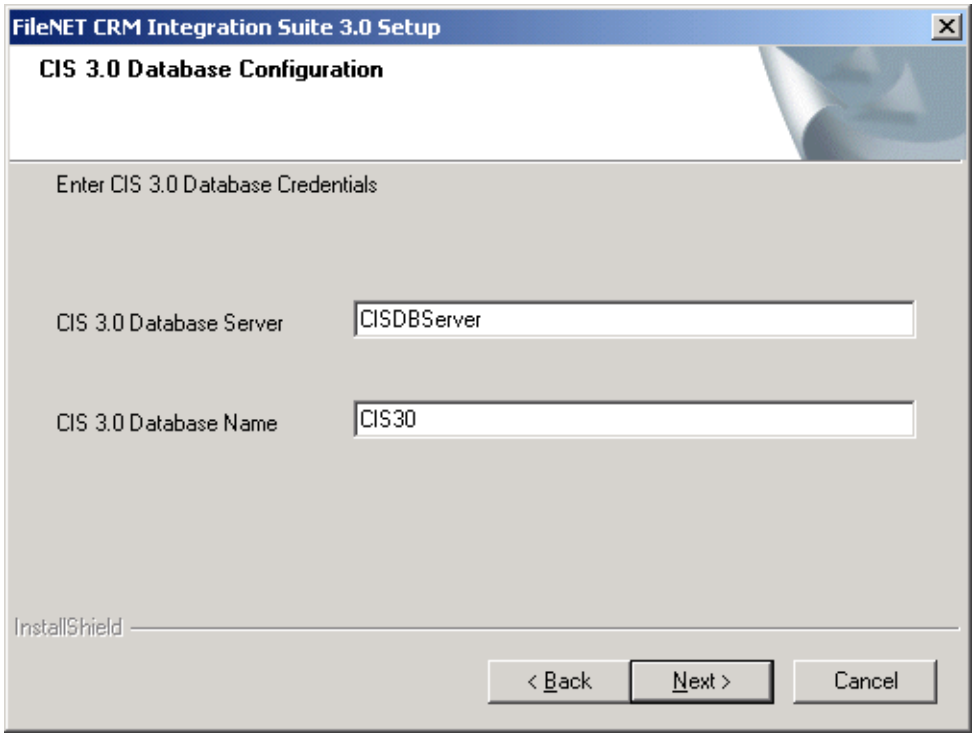
Select appropriate database type for CIS 3.0 database and click on **Next** button.

- For Database type ORACLE following screen will appear

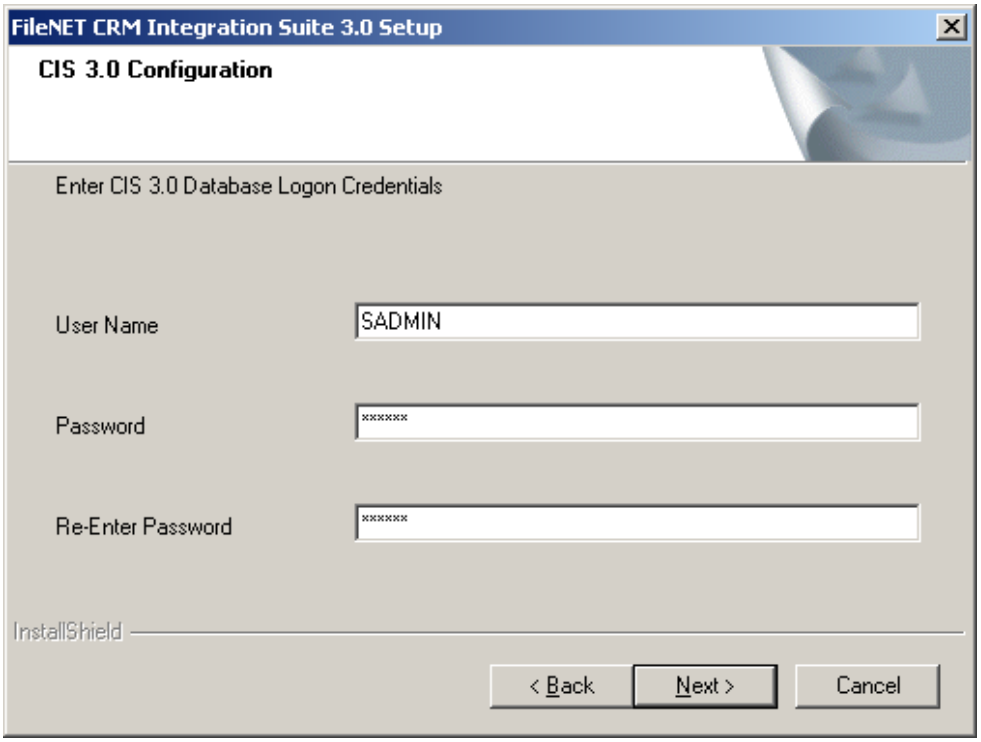


Provide TNS name for CIS 3.0 database and click on **Next** Button

- For Database type SQL Server following screen will appear

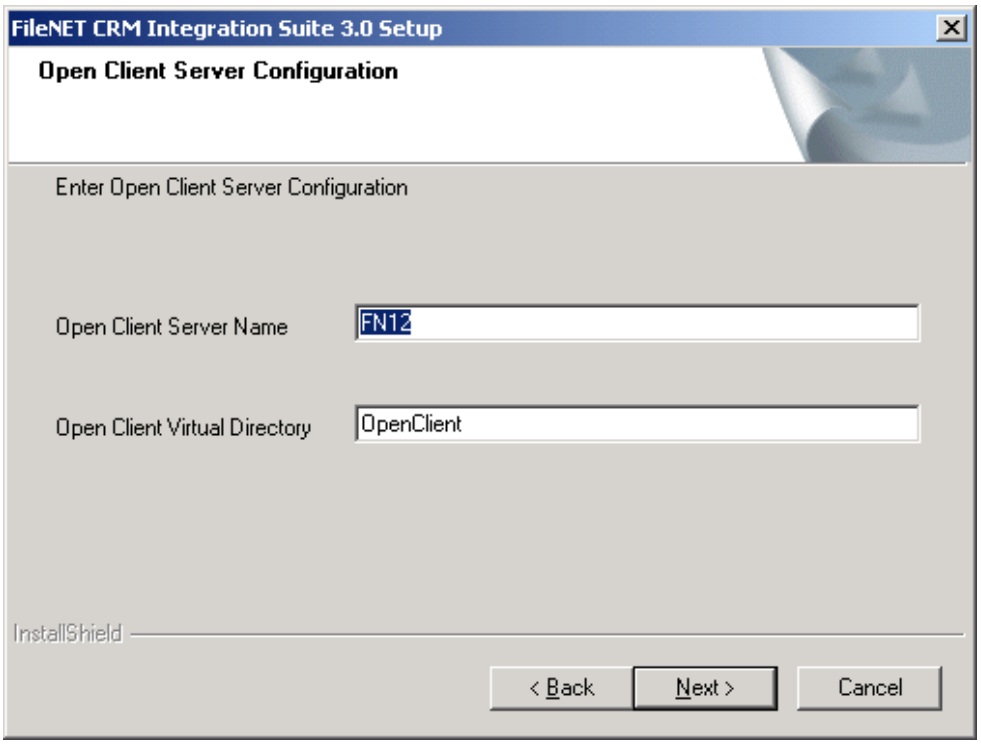


Provide Database server name and database name for CIS 3.0 database. To proceed, click on **Next** Button. Following screen will appear.



Provide CIS 3.0 Database logon credentials i.e. User Name and Password. Confirm the password by re-entering it.

Click on **Next** button, Open client server configuration screen will appear.

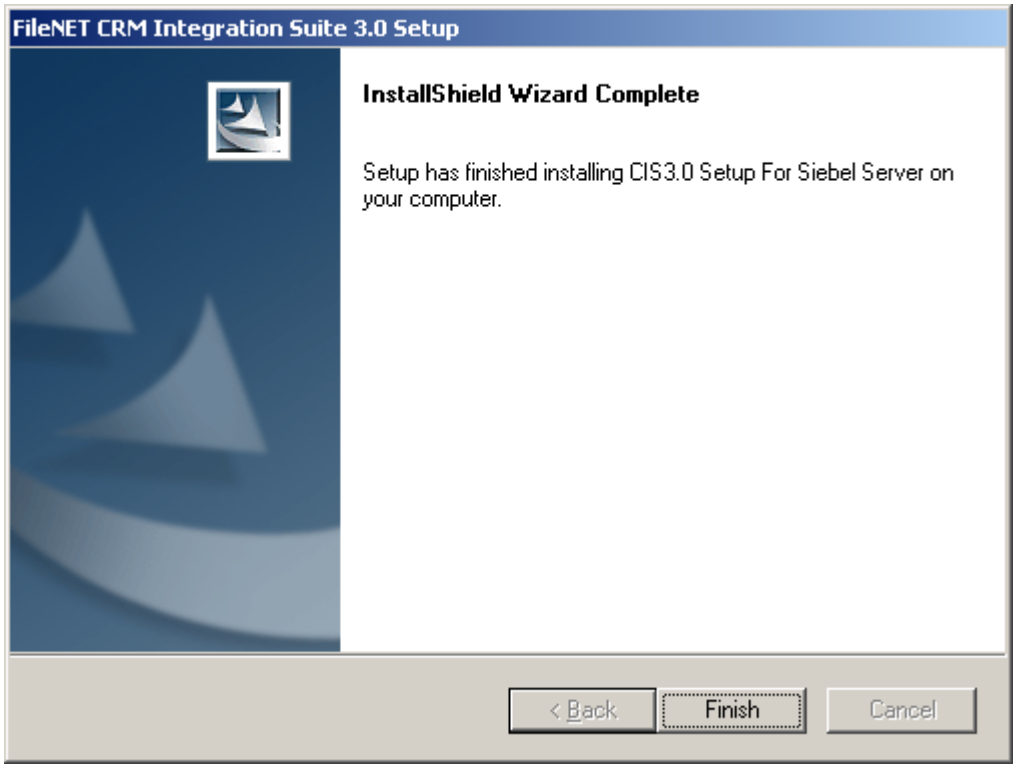


Enter **Open Client Server name** and **Open Client virtual directory** name. Open Client virtual directory name is the name of the virtual directory that provides access to Open Client.

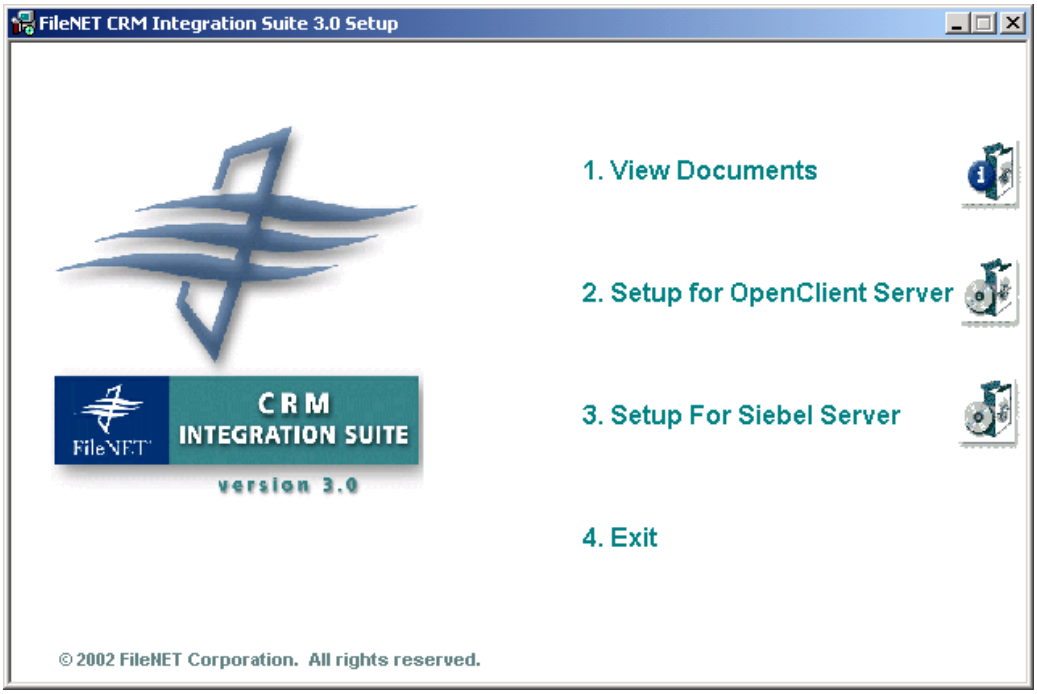
Open Client virtual directory name can be picked from windows registry by looking for 'IDMWSXVDir' key value under HKEY_LOCAL_MACHINE/ FileNET /IDM /Web_Specific folder.

Note Default values for Open Client Server name will be the local server name and Open Client virtual directory name will be Open Client's virtual directory name on the machine, if available.

To continue, click on **Next** button. Following screen will appear.



To continue, click on **Finish**. Following screen will appear



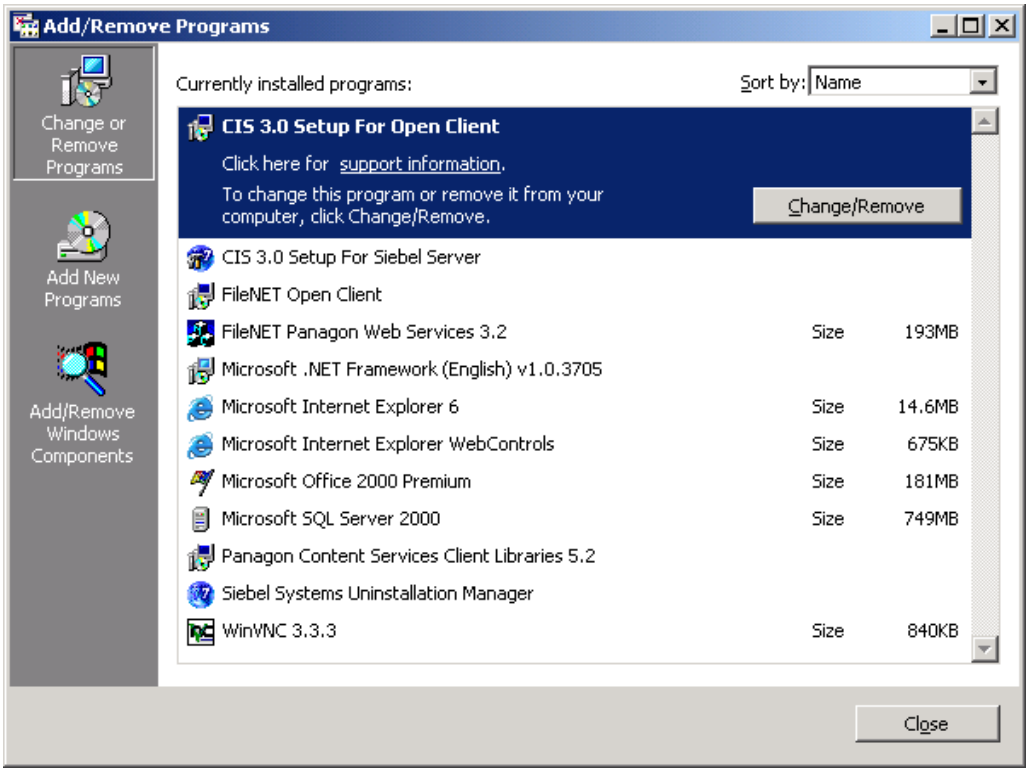
Exit

Exit option will close the setup program.

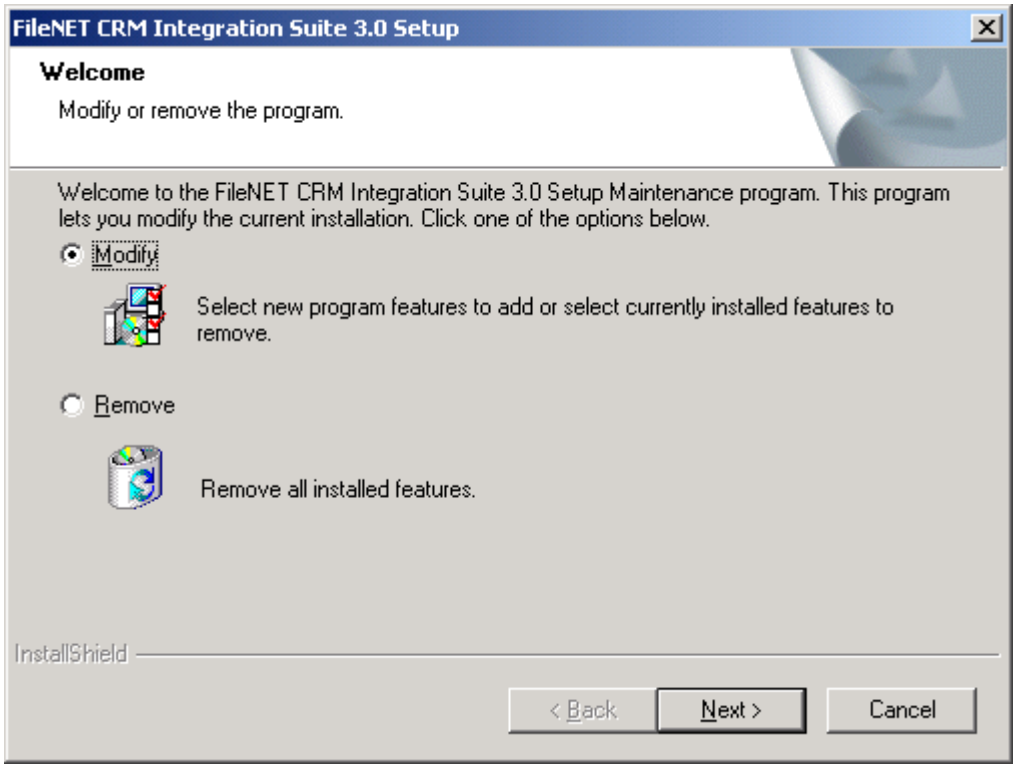
Modifying CIS3.0 Application

Modify Setup for Open Client

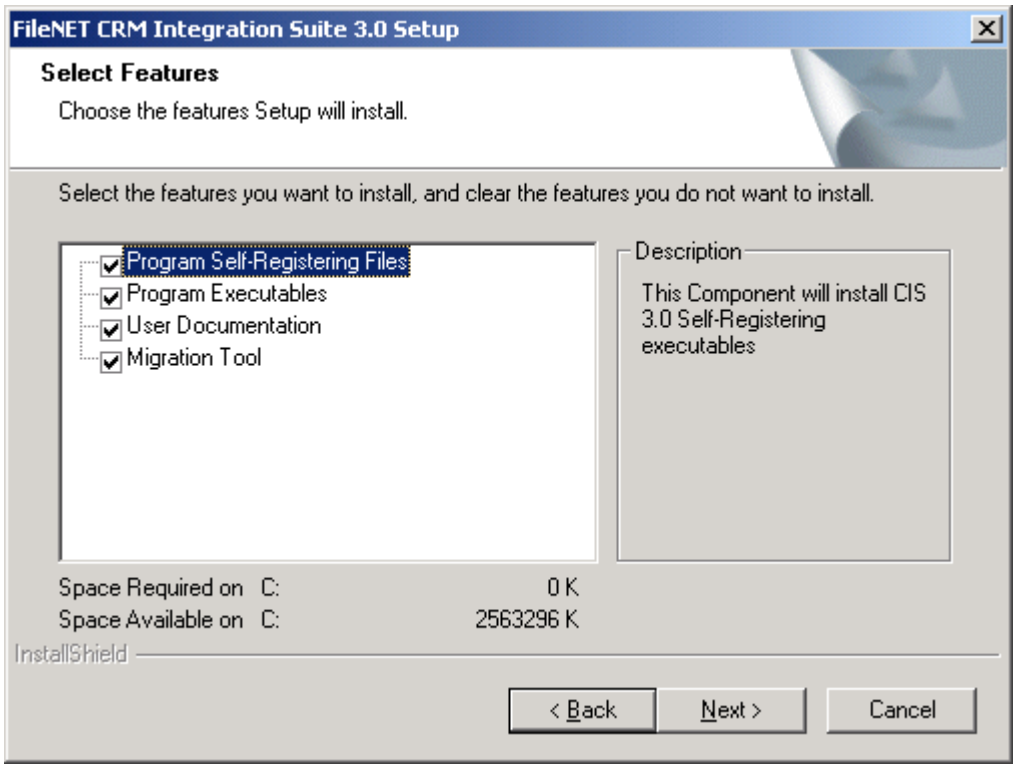
To modify CIS 3.0 setup for Open Client navigate to Start->Settings->Control Panel->Add /Remove Programs



Select program **FileNET CRM integration Suite 3.0** and click on **Change/Remove** Button, following screen will appear

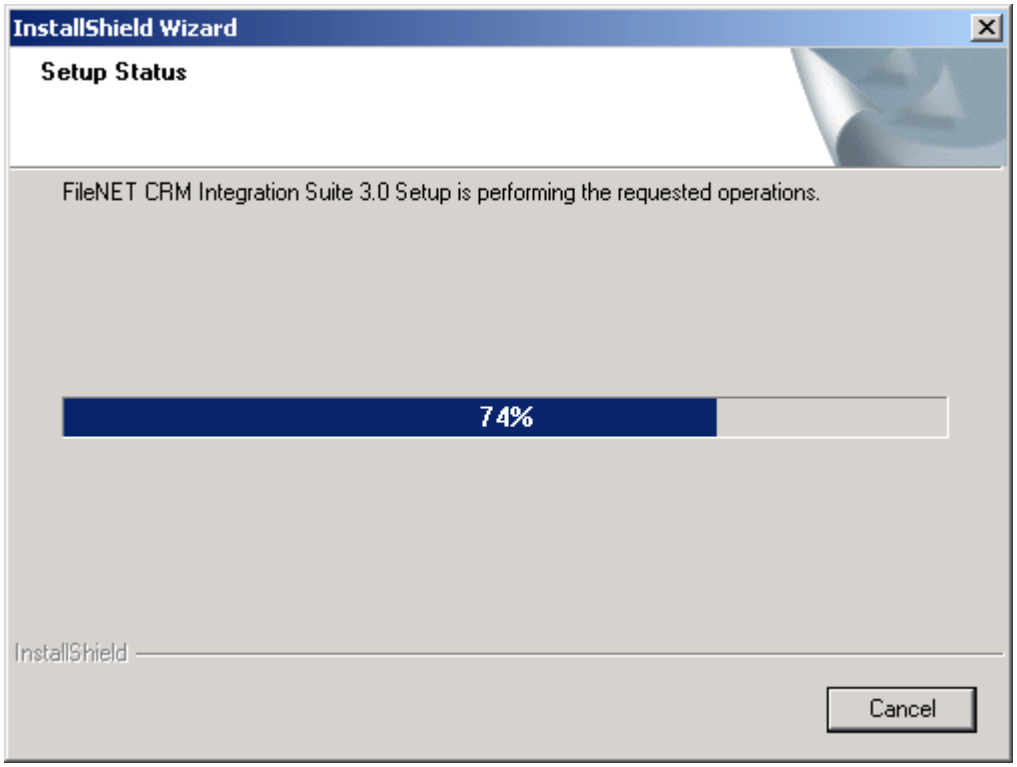


Select **Modify** option. To continue, click on **Next** button. Following screen will appear

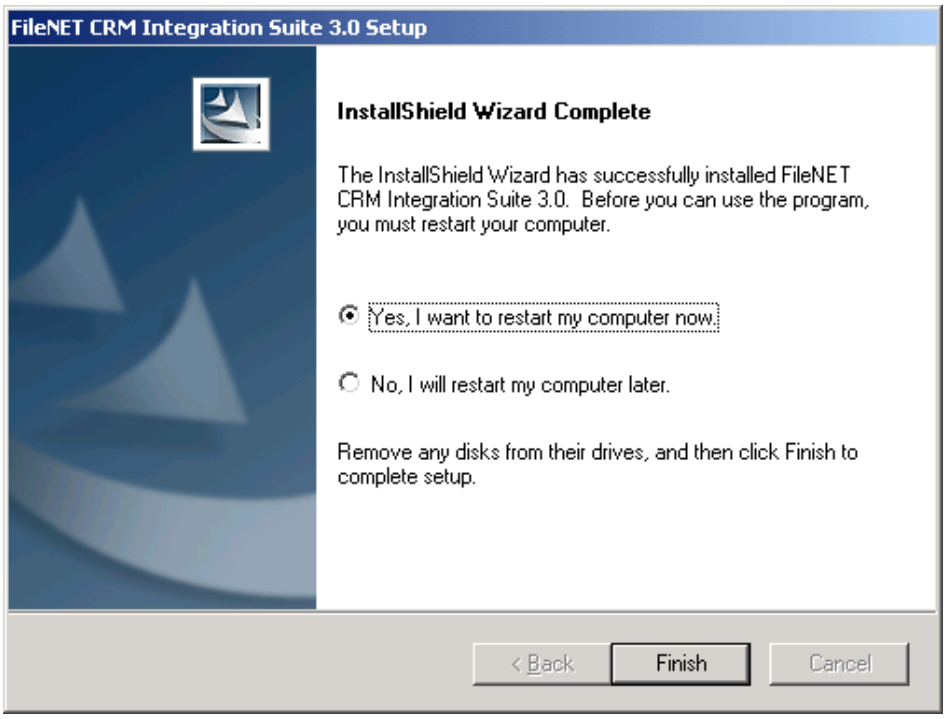


Select components to be modified.

To continue, click on **Next** button. Following screen will appear



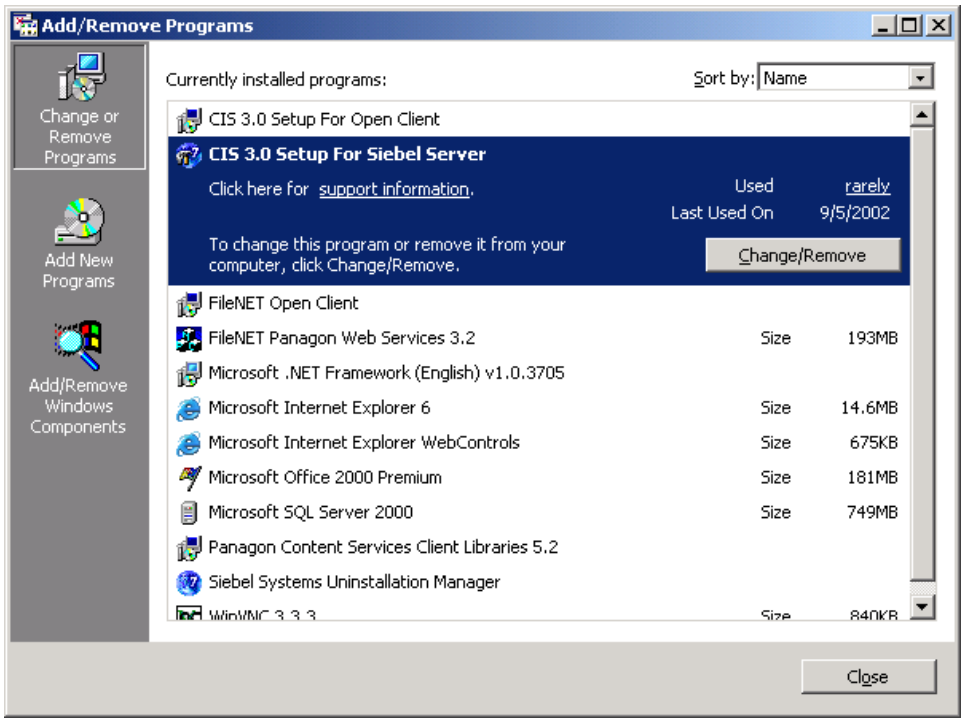
This screen will be followed by Setup completion screen



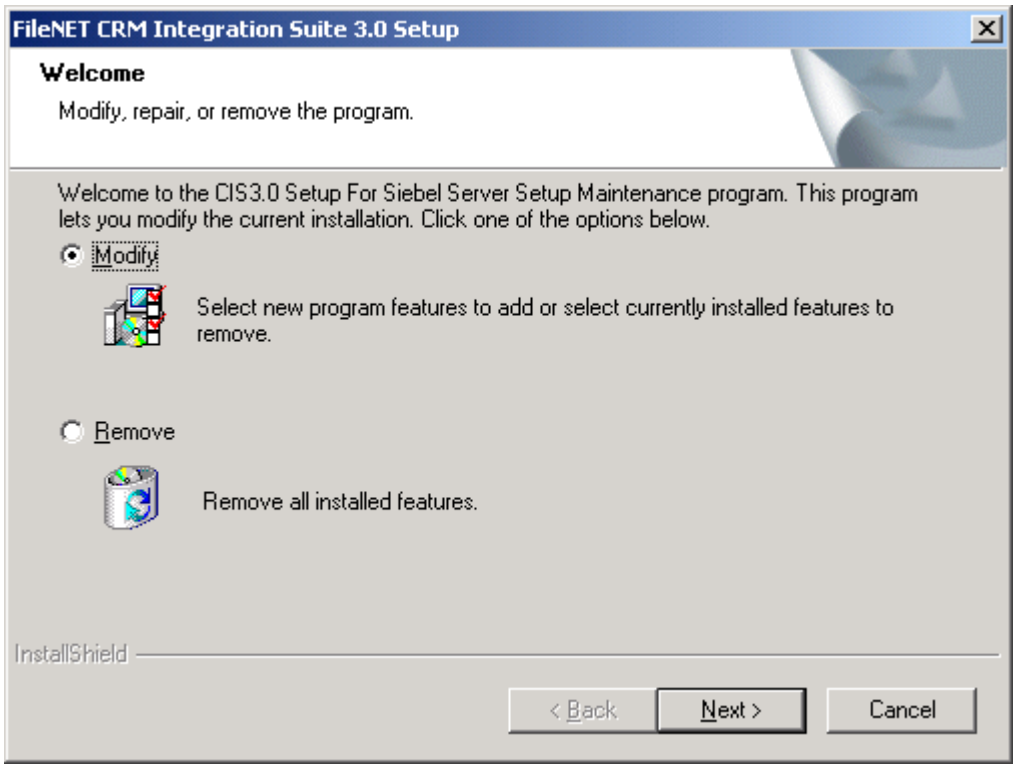
Click on **Finish** button.

Modify CIS 3.0 Setup for Siebel Server

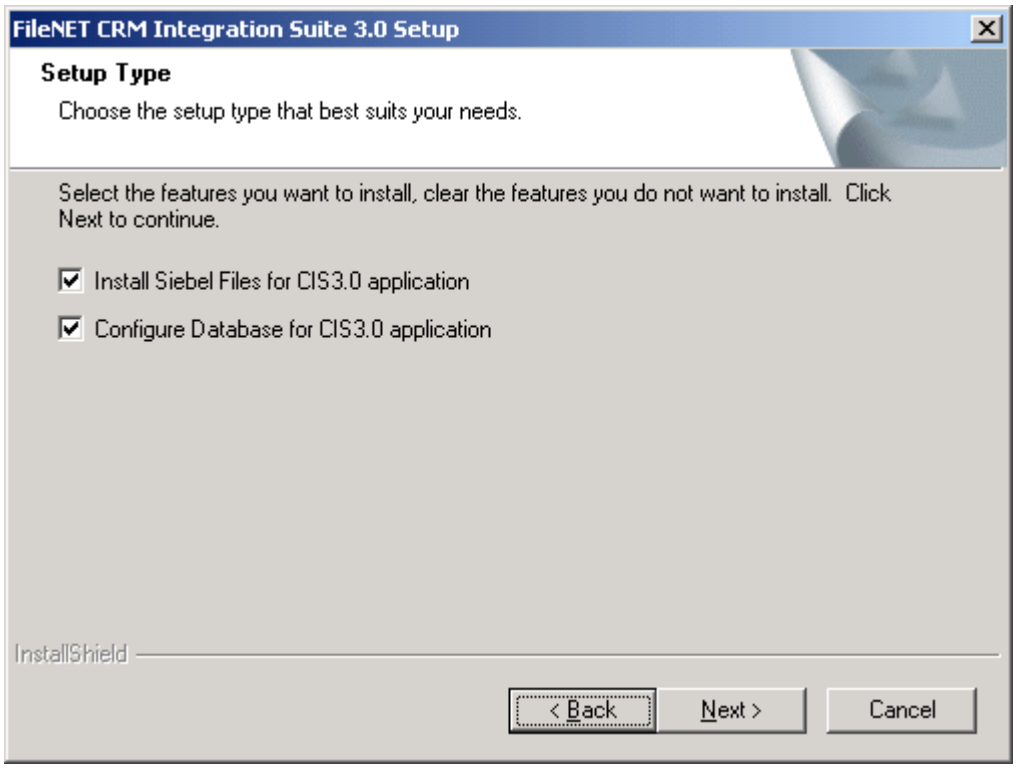
To modify CIS 3.0 setup for Siebel server navigate to Start->Settings->Control Panel->Add /Remove Programs



Select program **CIS 3.0 Setup for Siebel Server** and click on **Change/Remove** Button, following screen will appear

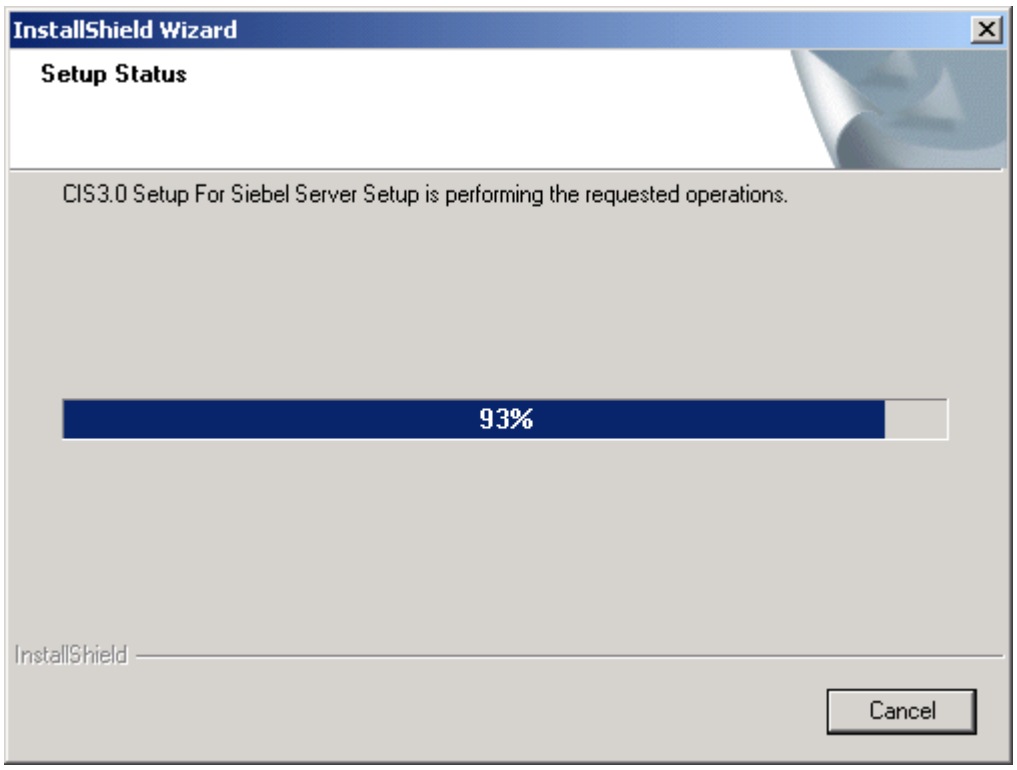


Select **Modify** option and click on **Next** button. Following screen will appear.

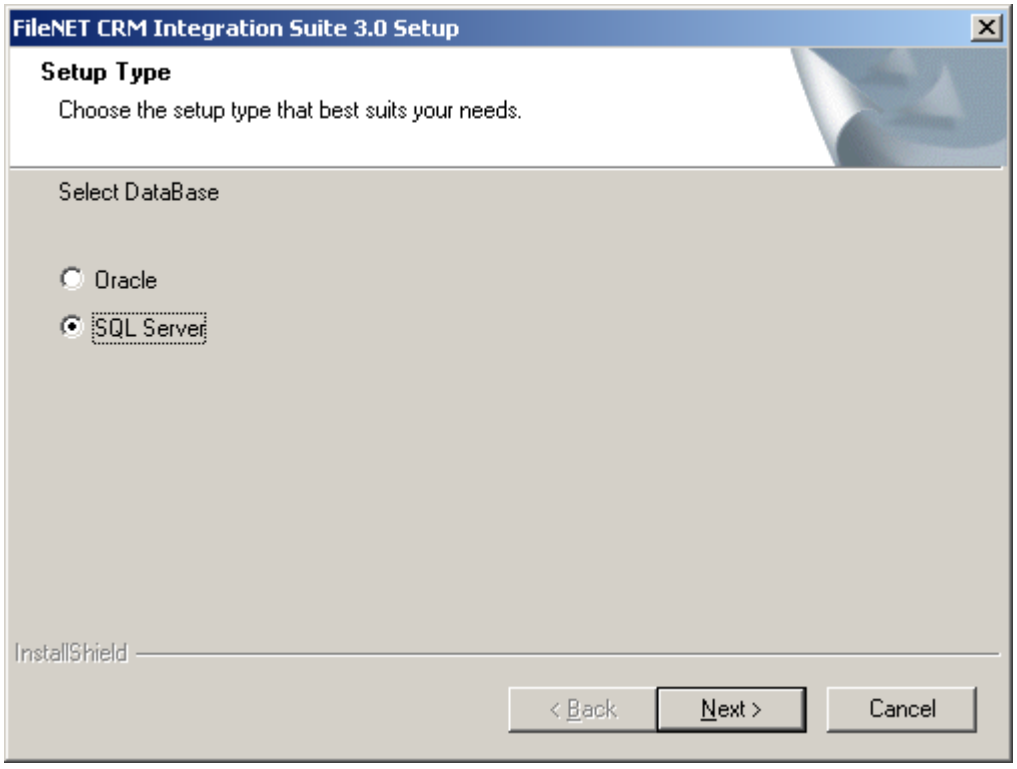


Select setup options to be performed. By default, both the option will be selected.

To continue, click on **Next** button. Following screens will appear

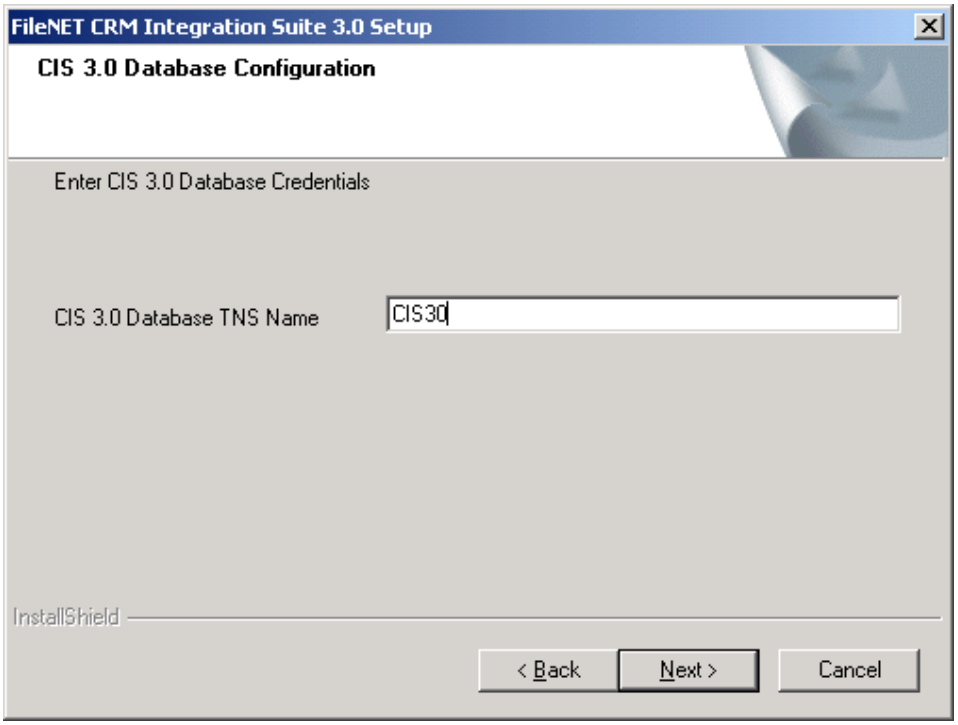


This screen will be followed by Database configuration screen.



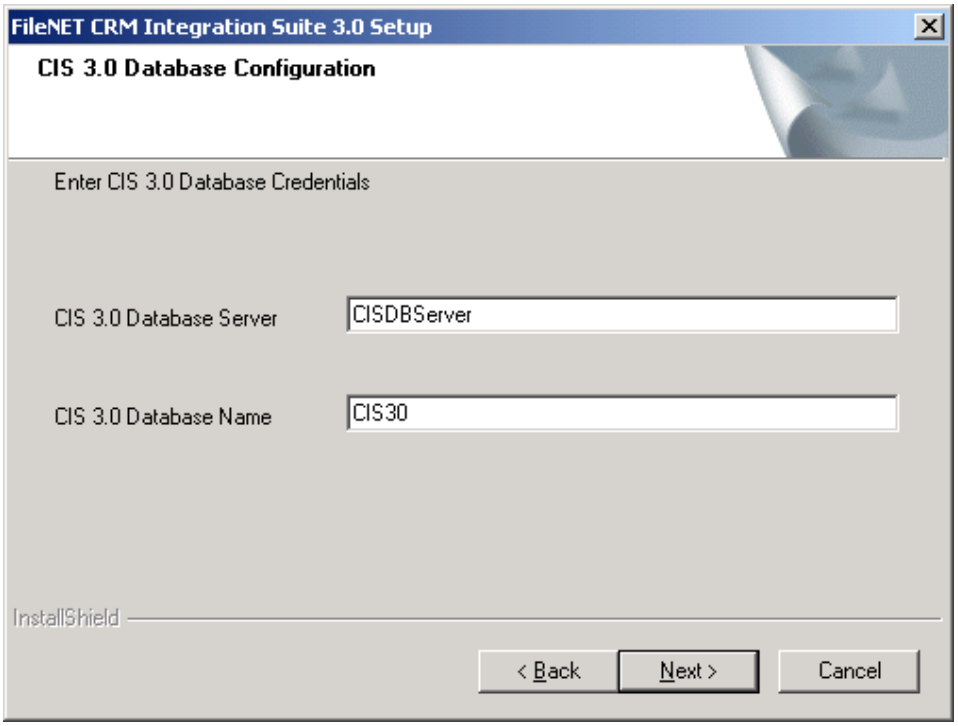
Select appropriate Database type for CIS 3.0 database and click on **Next** button.

- For Database type ORACLE following screen will appear

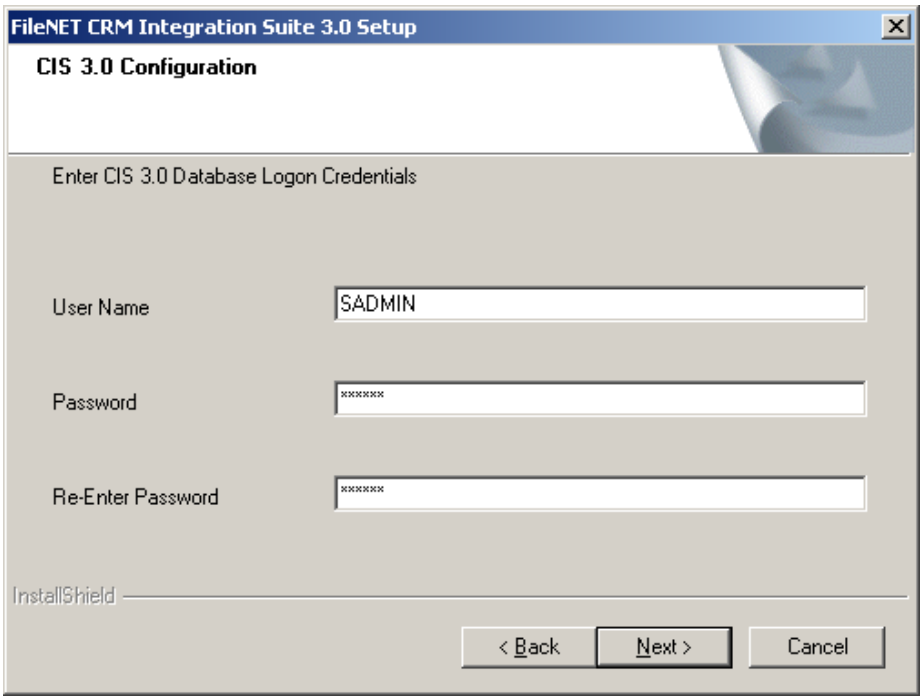


Provide TNS name for CIS 3.0 database and click on **Next** Button

- For Database type SQL Server following screen will appear

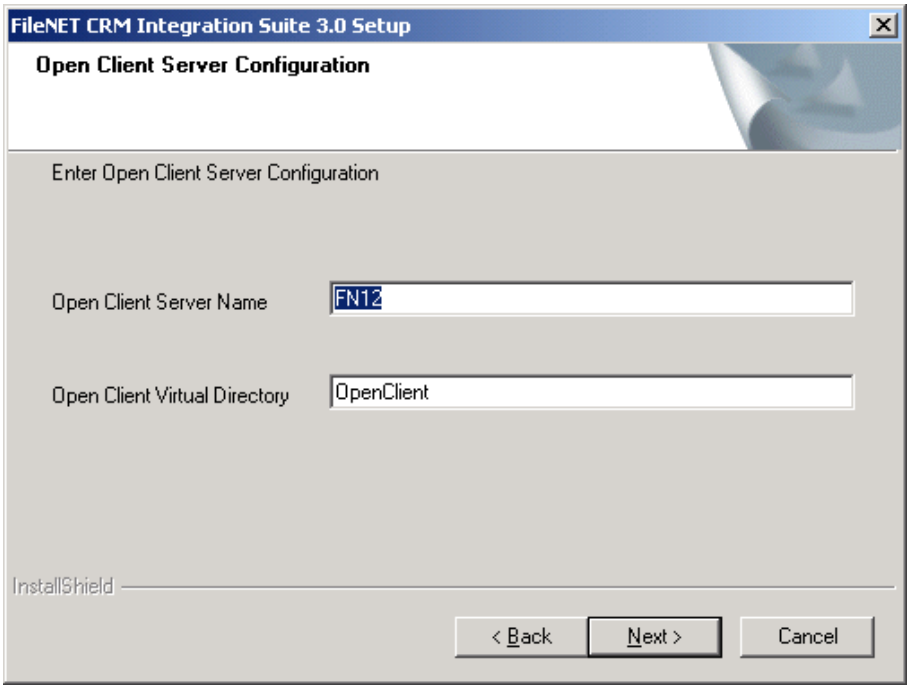


Provide Database server name and database name for CIS 3.0 database. To continue click on **Next** Button, following screen will appear.



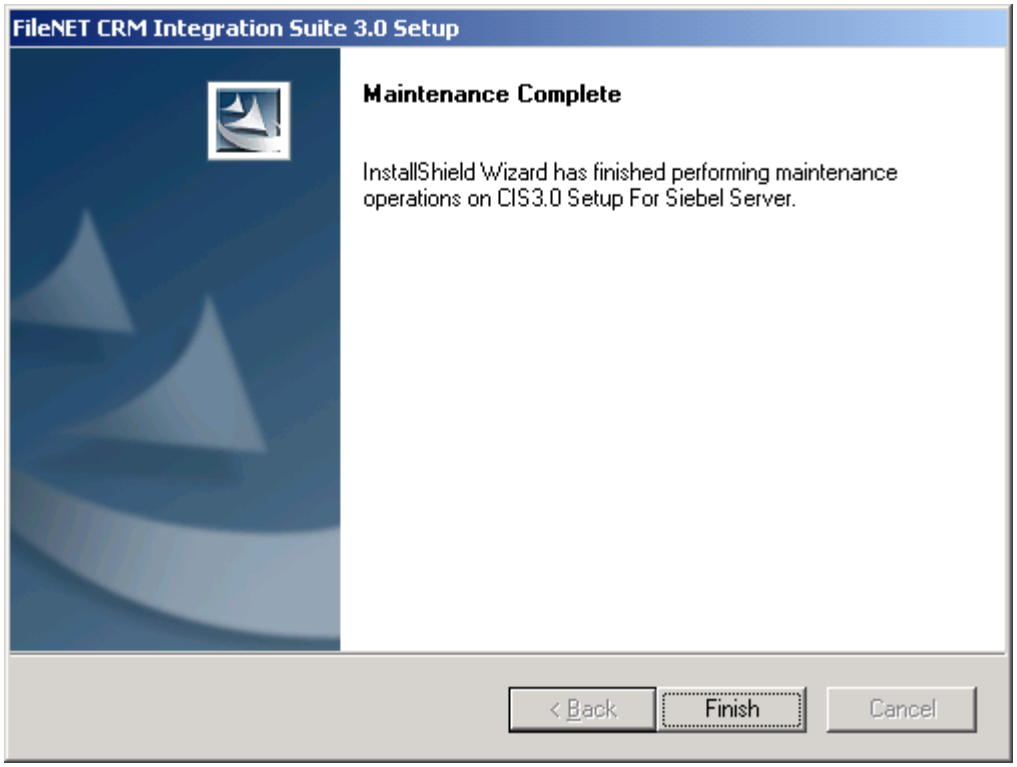
Enter CIS 3.0 Database logon credentials i.e. User Name and Password. Confirm the password by re-entering it. Click on **Next** button, Open Client Server configuration screen will appear.

Note Screens related with the database configuration will appear only if Configure Database for CIS 3.0 application option is selected.



Enter CIS 3.0 Server name and Open Client virtual directory name.

To continue, click on **Next** button. Following screen will appear

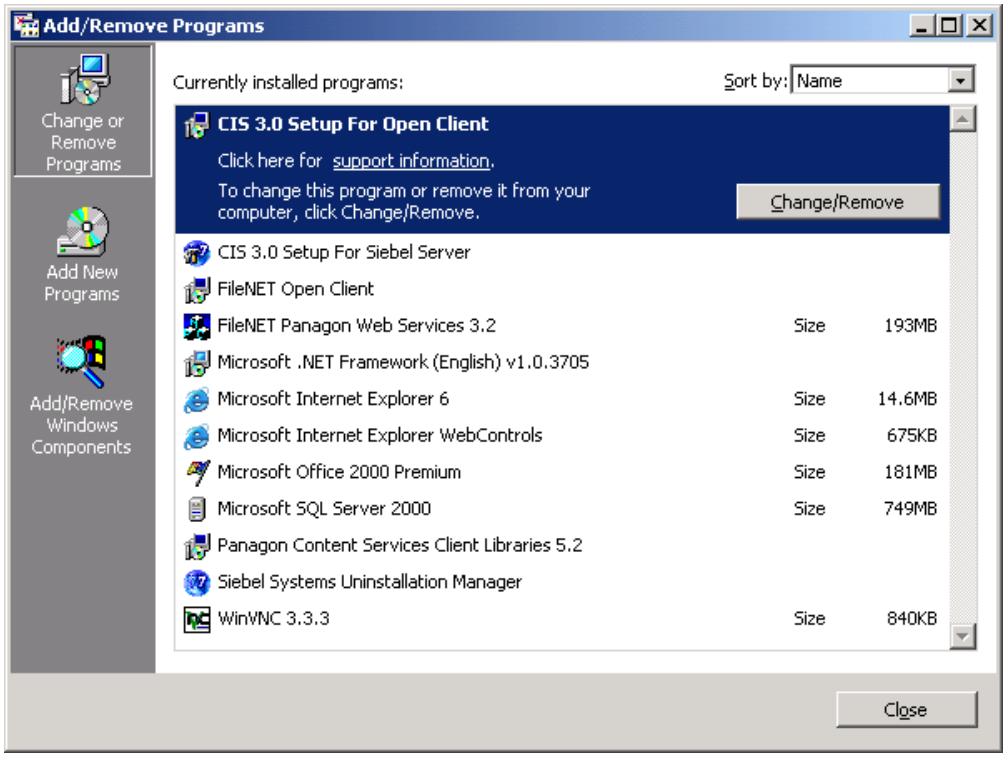


Click on **Finish** button.

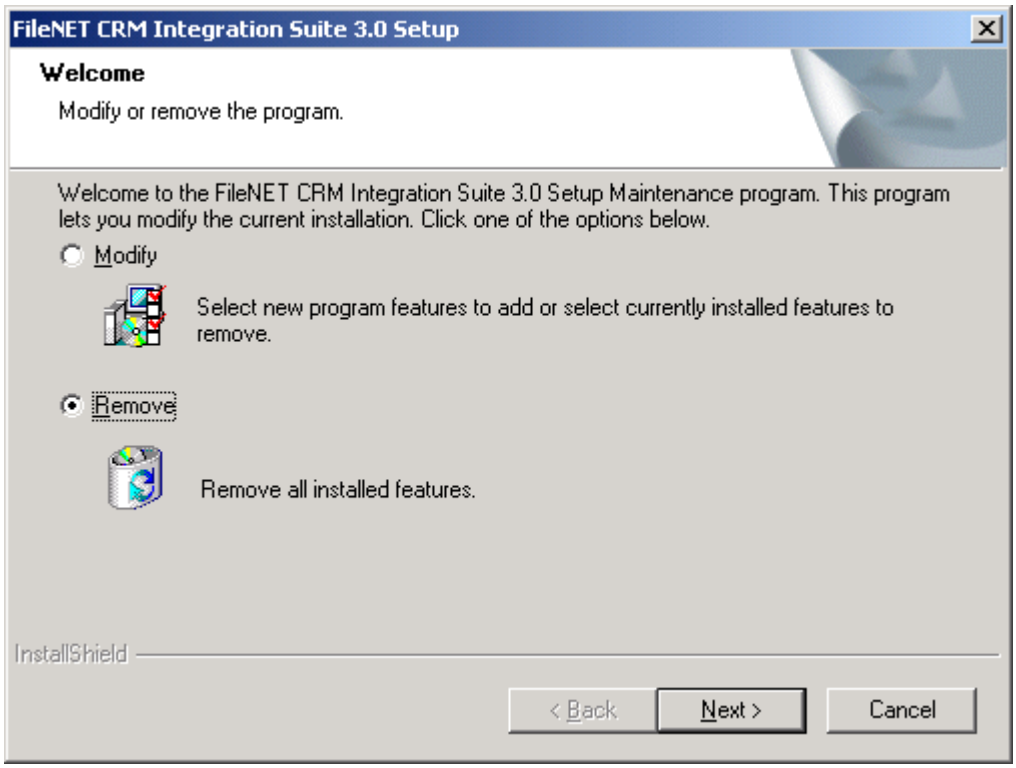
Removing CIS3.0 application

Remove CIS 3.0 Setup for Open Client

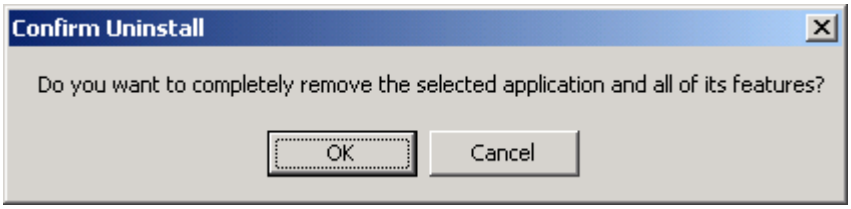
To remove CIS 3.0 setup for Open Client navigate to Start->Settings->Control Panel->Add /Remove Programs



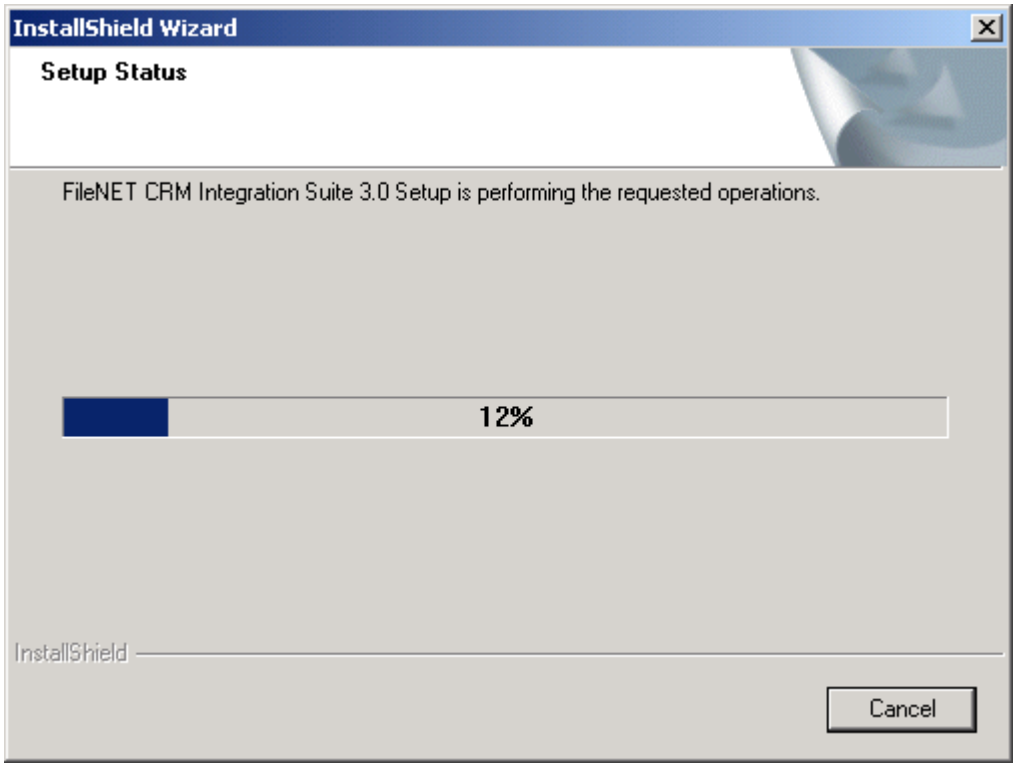
Select program **CIS 3.0 Set-up for Open Client** and click on **Change/Remove** Button, following screen will appear



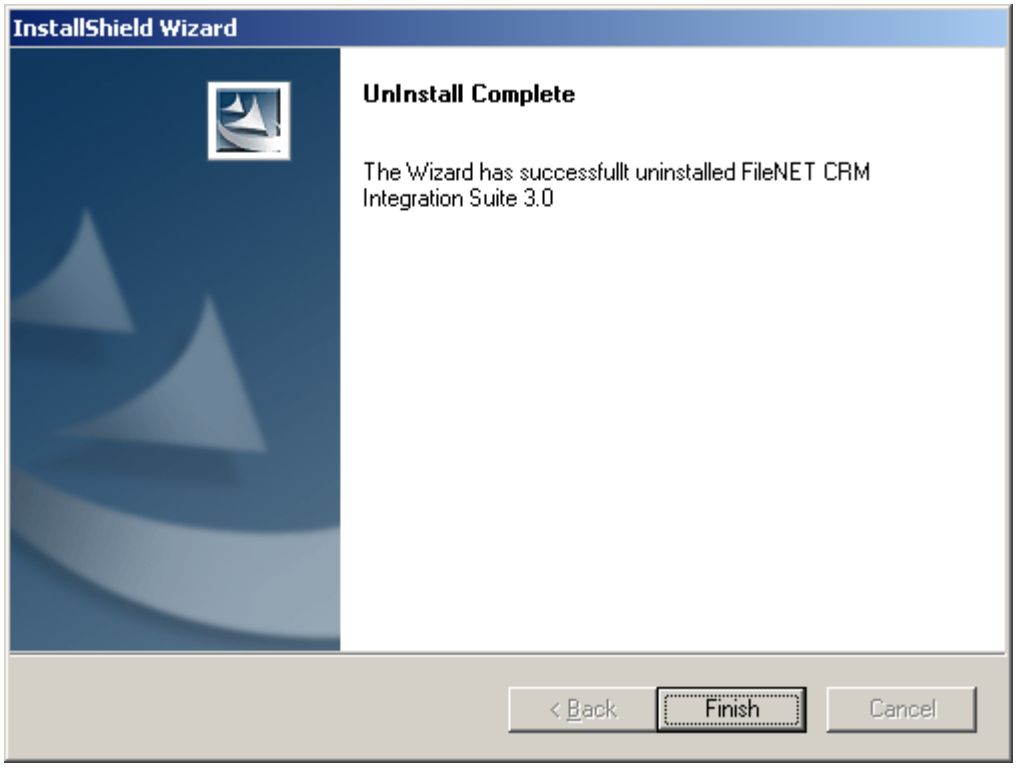
Select **Remove** option and click on **Next** Button. Following screen will appear.



Click on **Ok** button to Confirm removal of CIS 3.0 installation. Following screen will appear.



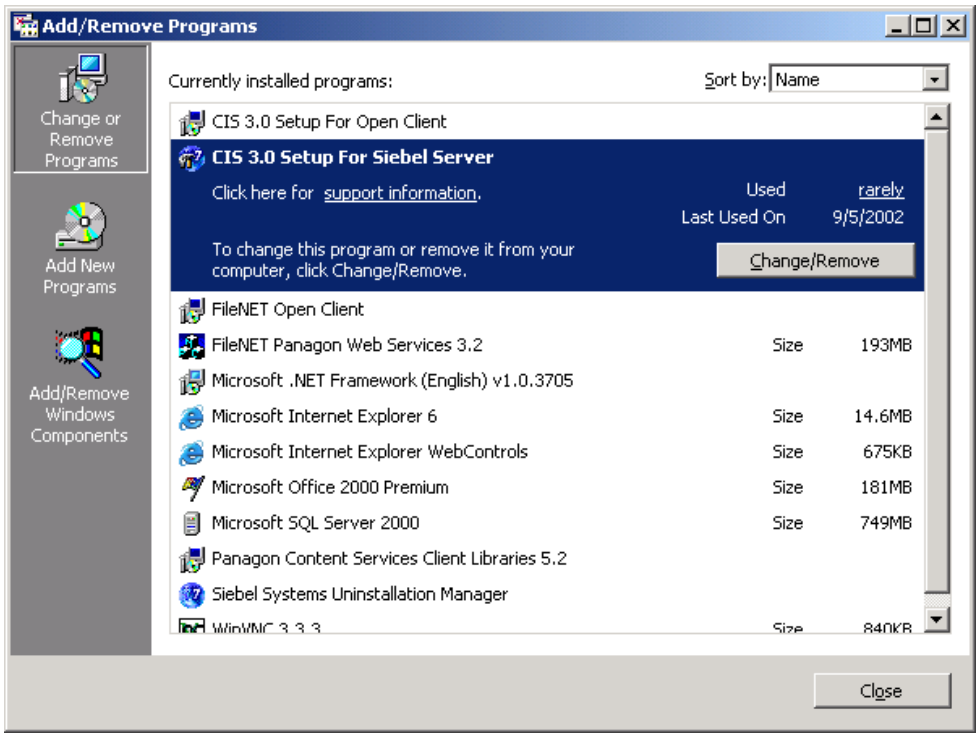
This screen will be followed by process completion screen.



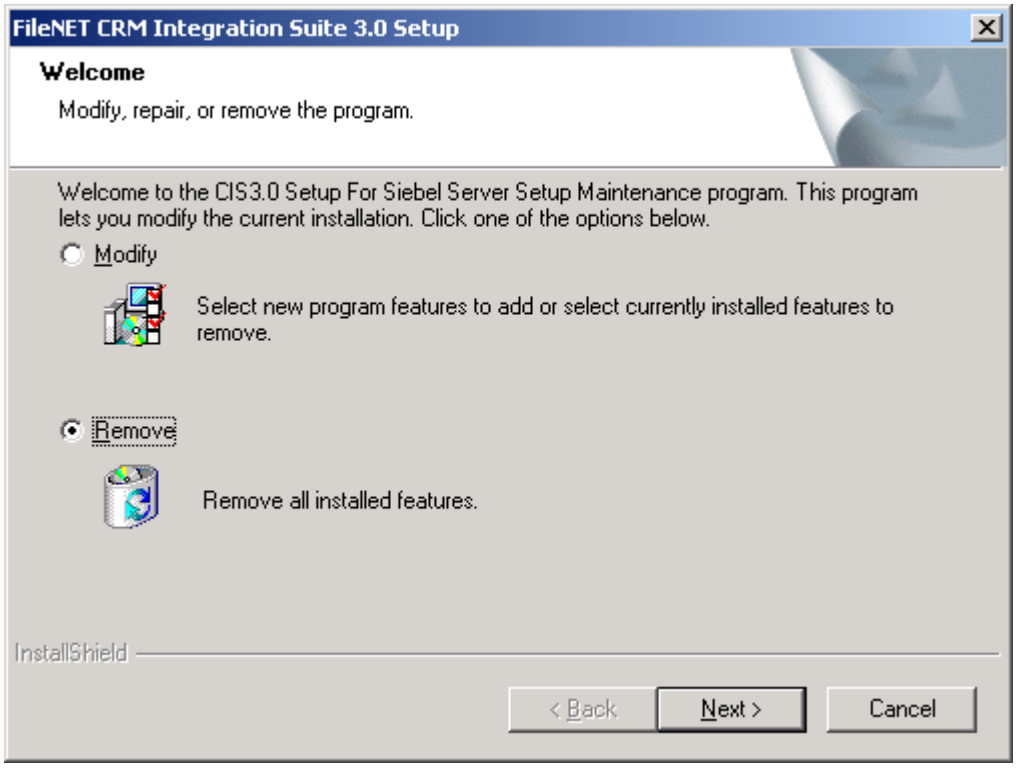
Click on **Finish** button.

Remove CIS 3.0 Setup for Siebel Server

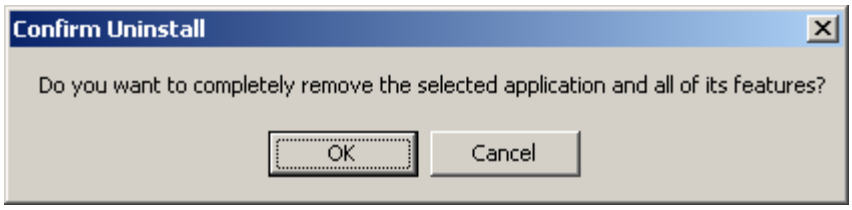
To remove CIS 3.0 setup for Siebel server navigate to Start->Settings->Control Panel->Add /Remove Programs



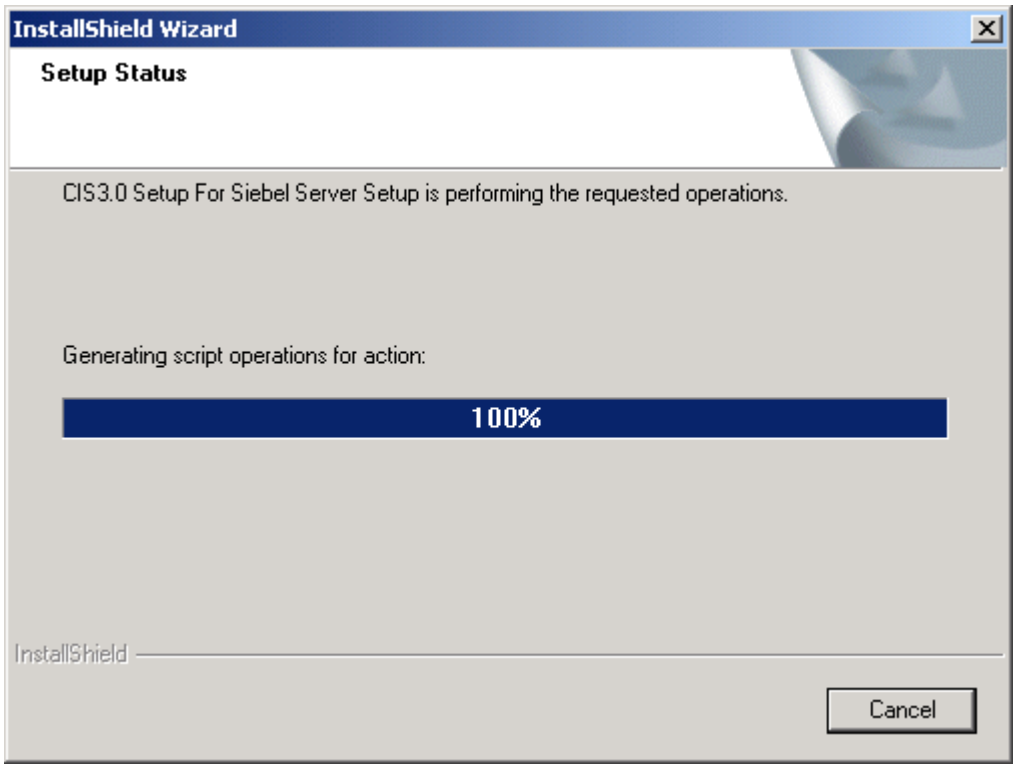
Select program **FileNET CRM integration Suite 3.0 for Siebel Server** and click on **Change/Remove** Button, following screen will appear



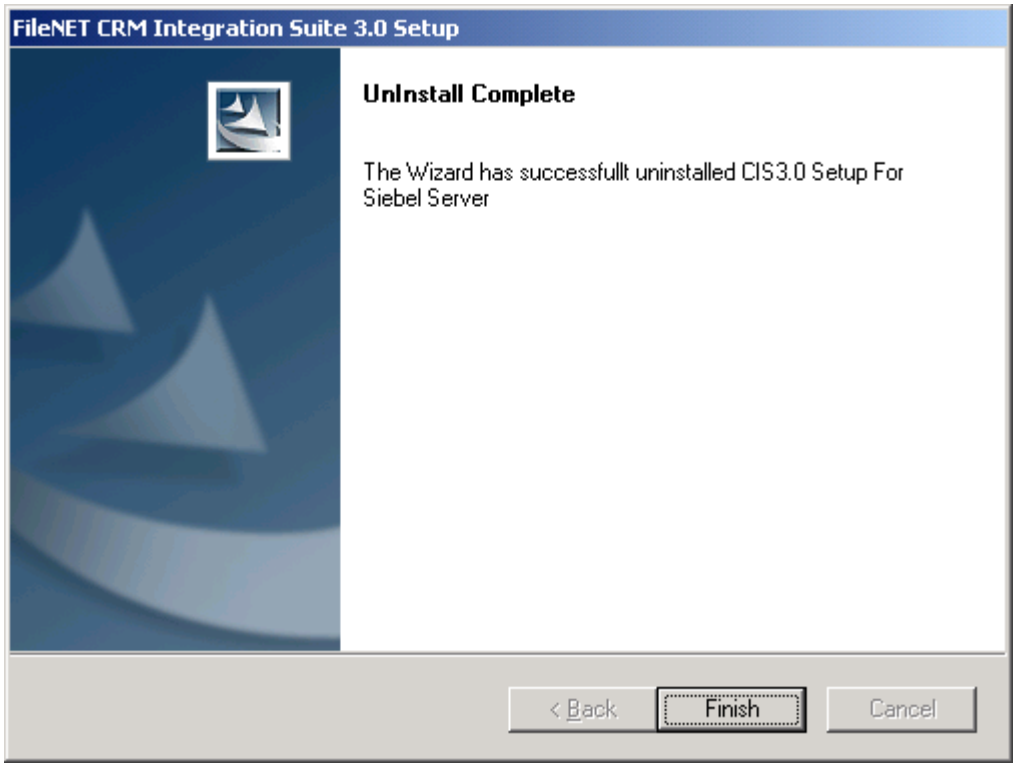
Select **Remove** option and click on **Next** Button. Following screen will appear.



Click on **Ok** button to Confirm removal of CIS 3.0 installation. Following screen will appear.



This screen will be followed by process completion screen.



Click on **Finish** button.

3
Creating CIS3.0 Database

As a part of CIS 3.0 installation, CIS 3.0 database scripts and batch files to run these scripts are copied in **SQLScripts** subfolder under CIS 3.0 installation folder.

There are two batch files, one is for ORACLE 8i RDBMS and other one is for SQL server 2000 RDBMS. Execute the appropriate batch file to create CIS database objects.

Note: CIS 3.0 database objects and CIS 2.1 database objects cannot be stored in the same database instance. Steps to create CIS 3.0 database are provided below and must be adhered to for proper functioning of CIS 3.0 application.

Creating CIS database in ORACLE 8i

Pre-Requisites

a. ORACLE server where CIS 3.0 database will reside
b. Database instance for CIS3.0
c. Tablespace named **CIS30** to hold all CIS tables and indexes
d. An account with the privilege to create objects in this Tablespace
e. TNS to connect to **CIS30** Tablespace
f. Connectivity to the ORACLE database, using tool SQL Plus.

From DOS command prompt execute **CIS3.0OracleScripts.bat** with three input parameters TNS name, user id and password delimited by space. The following is the syntax

CIS3.0OracleScripts.bat <TnsName> <User Id> <Password>

Creating CIS database in SQL Server 2000

Pre-Requisites

a. MS-SQL Server where CIS 3.0 Database will reside
b. Database named CIS30
c. CIS 30 DB user having db_owner role.
d. Connectivity to MS-SQL Server using Query Analyzer

From DOS command prompt run **CIS3.0SQLScripts.bat** with three input parameters SQL Server name, user id and password delimited by space. The following is the syntax

CIS3.0SQLScripts.bat <SQL Server name> <user id> <password>.

4
Application Configuration

CIS 3.0 application requires some basic application and database configuration before it is ready to be used.

Following steps are required to configure CIS 3.0 application using configuration tool

- Accessing CIS 3.0 Configuration tool
- Logon to configuration tool
- Current settings
- General settings
- Database settings
- Panagon settings
- Siebel settings
- Configuring CIS 3.0 Database
- Changing password for configuration tool

Accessing CIS 3.0 Configuration tool

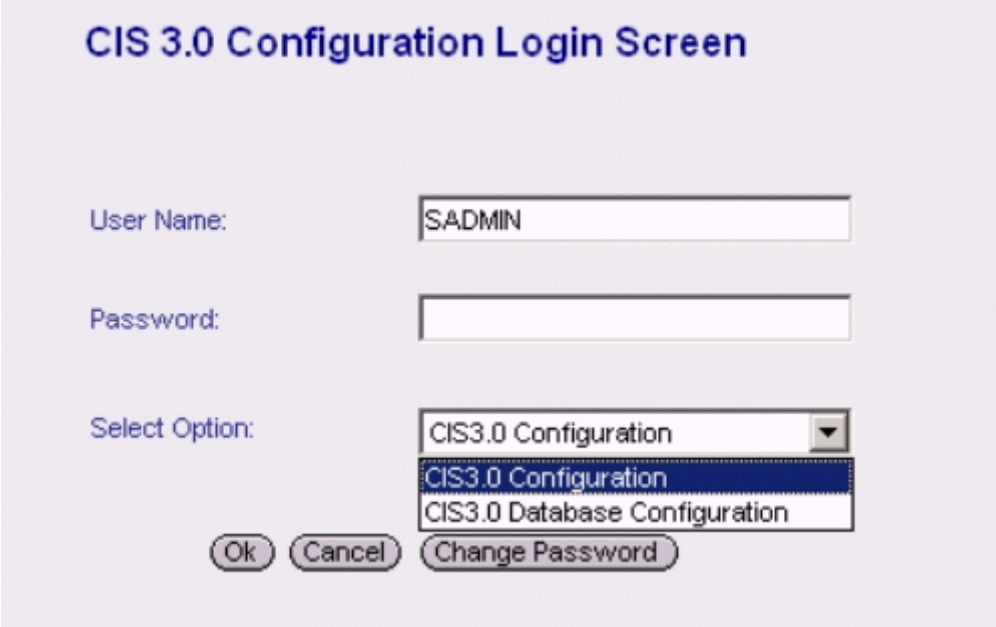
Navigate from windows explorer to Start -> Programs->FileNET CRM Integration Suite 3.0-> Configuration Tool

Or

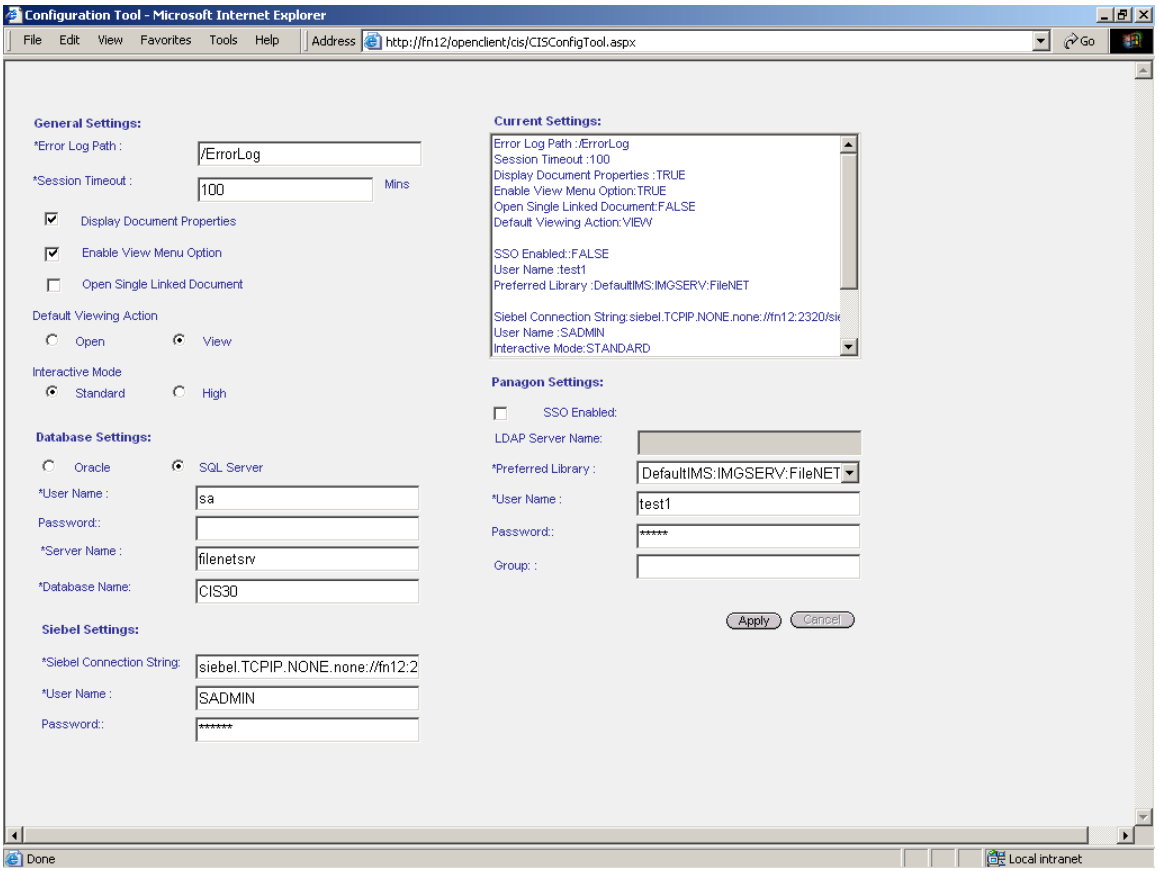
Opening URL http://<OpenClientServerName>/<OpenClient Alias name>/CIS from your web browser

CIS 3.0 Configuration Logon Screen appears.

Logon to configuration tool

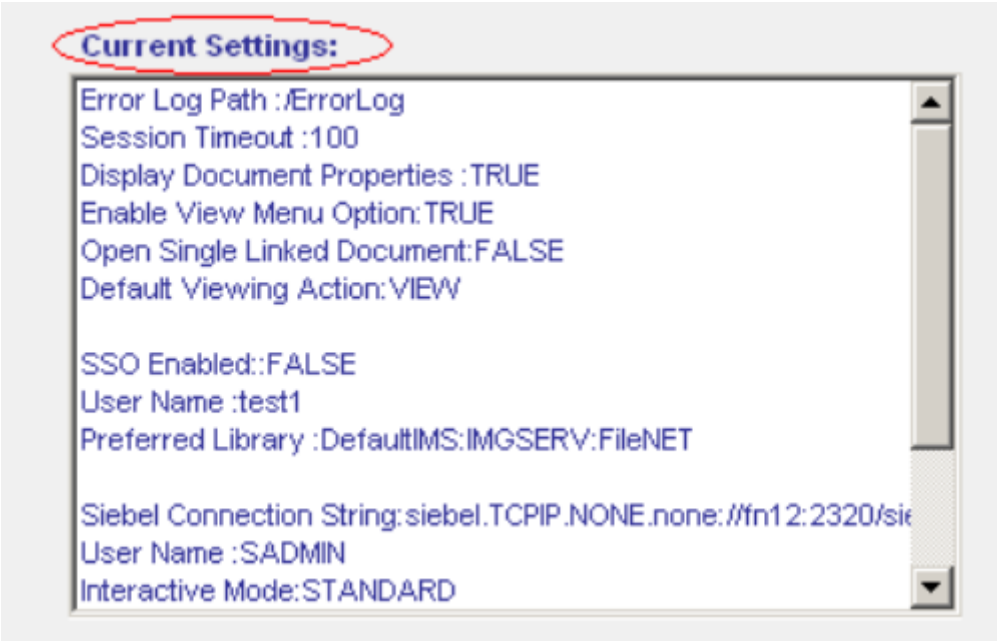


Enter valid logon credentials and configuration option. To continue, click on **OK**. Following screen will appear



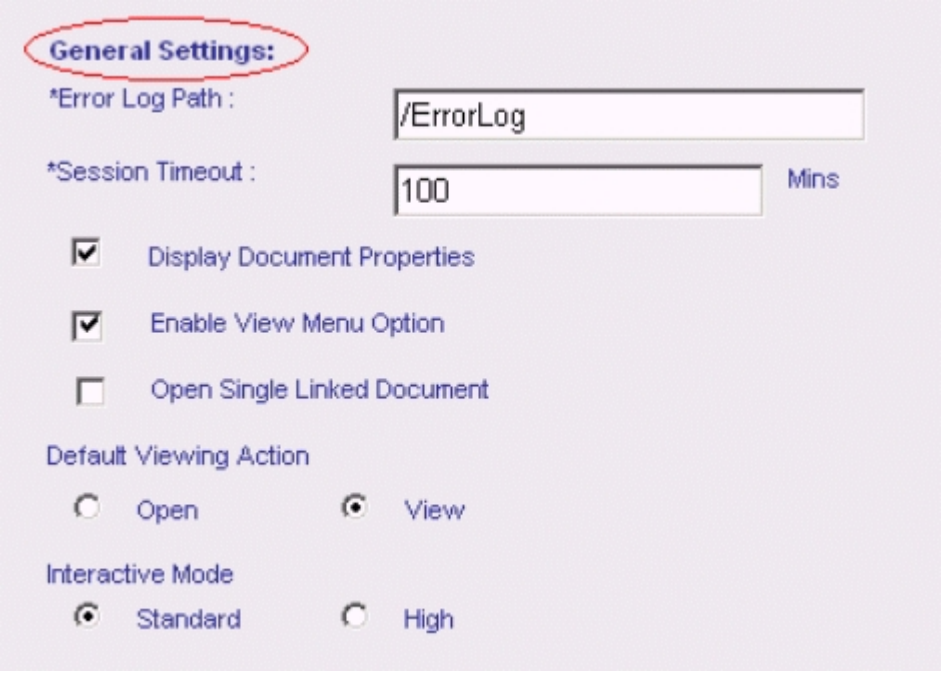
Note	Configuration parameters which have got asterisk '*' as prefix are mandatory and values for these parameters must be provided

Current Settings



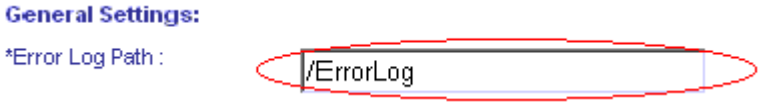
The text area **Current Settings** lists the current configuration settings.

General Settings



The following general settings are configurable:

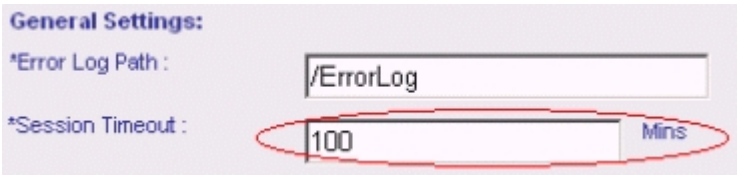
Error Log Path:



Specify the complete path of the folder for CIS 3.0 error Logs Default error log folder is /Errorlog under CIS 3.0 application installation folder. The error logs are generated for each day and are stored in text files in the format *CISError<mm_dd_yyyy>.log*

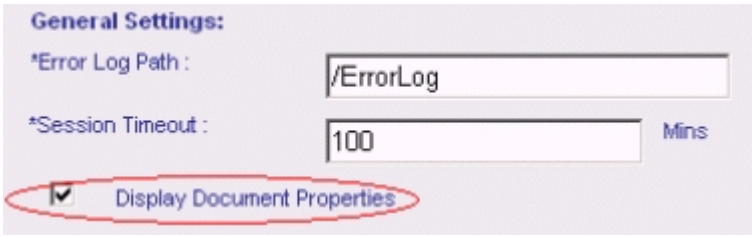
Note If specified Error Log folder does not already exist, folder will be created by CIS 3.0 application.

Session Time Out:



Specify the value for Session Time Out. The maximum value that can be specified is 1000 Minutes. While working with CIS Application, all unsaved data will be lost once the user is idle for the maximum value specified for session time out.

Display Document Properties:

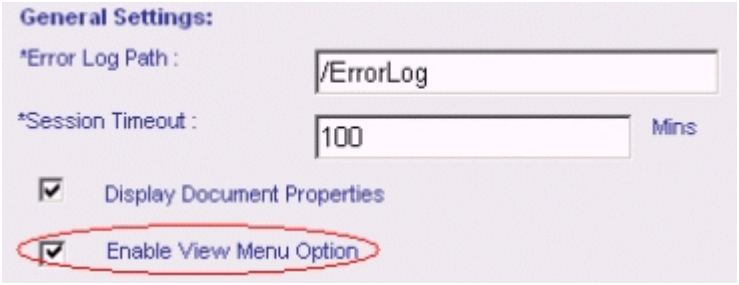


By default this option is checked. This option is required to display configured FileNET indices.

When unchecked following fields are displayed for all documents while viewing the document details:

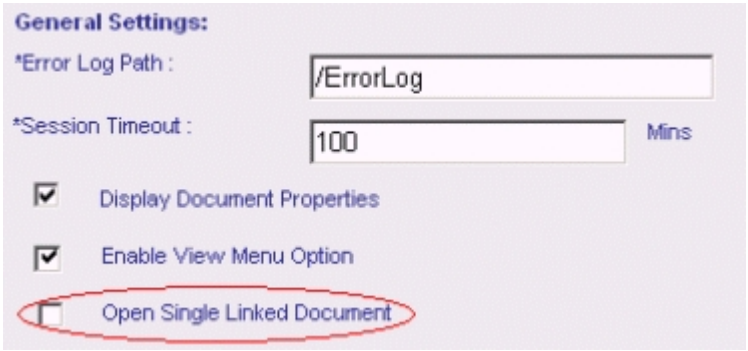
- Document ID
- Entry Date
- Pages

Enable View Menu Option:



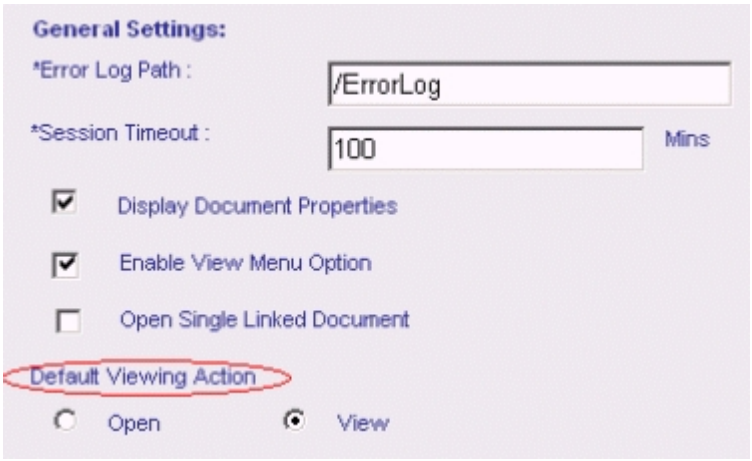
By default this option is checked. Check this checkbox to provide 'View' Button on CIS web pages. Click on 'View' Button opens the selected document in IDM Viewer.

Open Single Linked Document:



Check this checkbox to enable the facility of automatically opening of a single linked document for a document class.

Default Viewing Action:

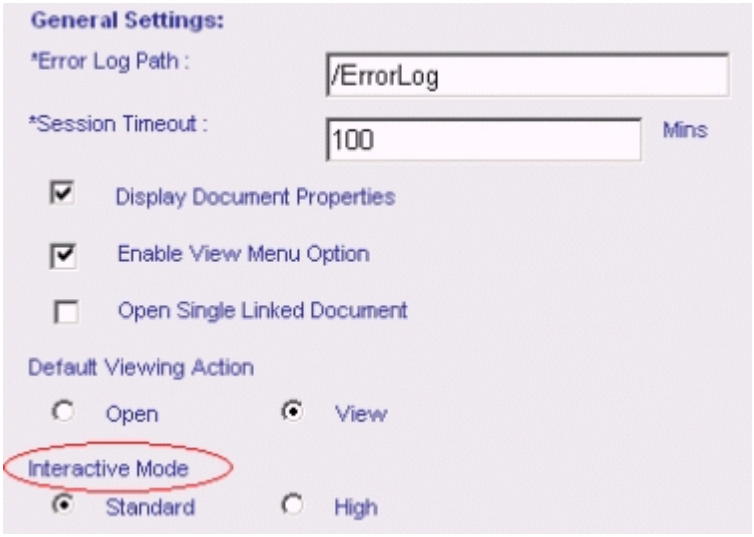


Specify Default Viewing Action.

View: Facilitates opening the selected document in IDM viewer

Open: Facilitates opening of selected document in JAVA viewer provided selected document MIME type is supported by JAVA viewer else it opens the document in Native application.

Interactive Mode:

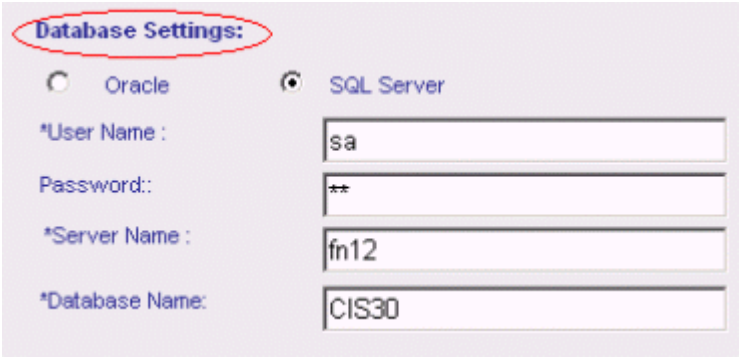


Specify interactivity mode for CIS 3.0 application**.**

High – High Interactivity support an implicit save whereby navigating off a record causes the changes to be saved.

Standard- Standard Interactivity supports an explicit save operation for each record to commit the changes.

Database Settings



CIS 3.0 supports **Oracle 8i** and **SQL Server 2000** for CIS database.

Specify database type by selecting appropriate option

If selected database type is **Oracle**,

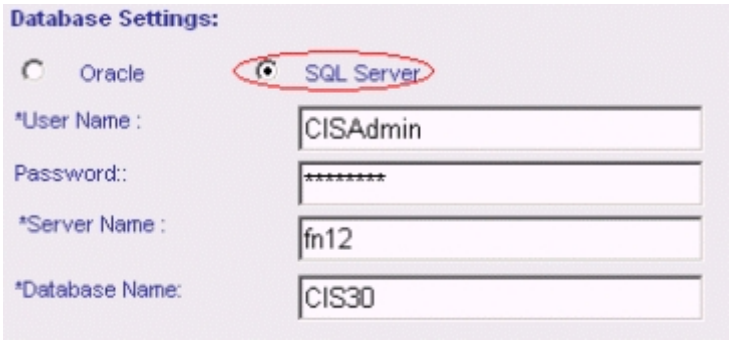
Specify the following values required for logon

User ID: A valid User ID of the user with access to CIS database and has insert/update/delete rights on CIS tables.

Password: Specify the valid password for the user specified in User ID textbox.

TNS Name: Specify the TNS Name to connect to CIS database. TNS name is defined in TNSNAMES.ORA file in Oracle.

If selected database type is **SQL Server**,



Please specify the following values required for logon

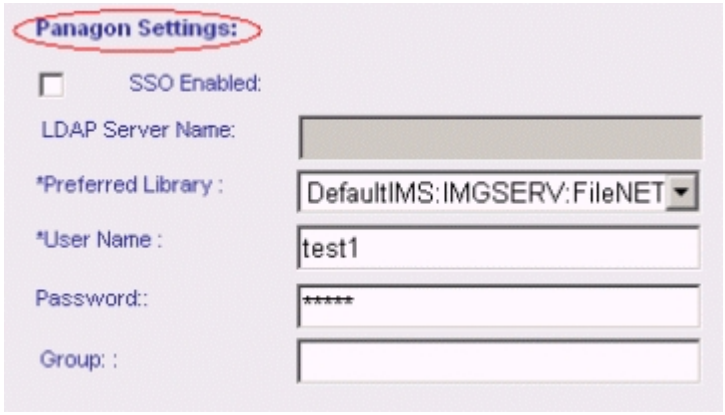
User ID: A valid User ID of the user with access to CIS database and has insert/update/delete rights on CIS tables.

Password: Specify the valid password for the user specified in User ID textbox.

Server Name: Specify the Server name on which the SQL Server database has been setup.

Database Name: Specify the name of CIS Database.

Panagon Settings



SSO Enabled: To use Single Sign on mechanism for FileNET logon, you should check SSO check box. To know more about 'SSO ', refer to section "Single Sign On" in Appendix A.

LDAP Server Name: LDAP server name is required only when SSO Enabled option is checked. Specify LDAP server name that is being used by Siebel and FileNET for external authentication.

Preferred Library: Specify the library, which will be most frequently used by CIS 3.0 users. This library will be default library for all CIS operations. These IDM libraries are configured on the system using IDM configure Tool.

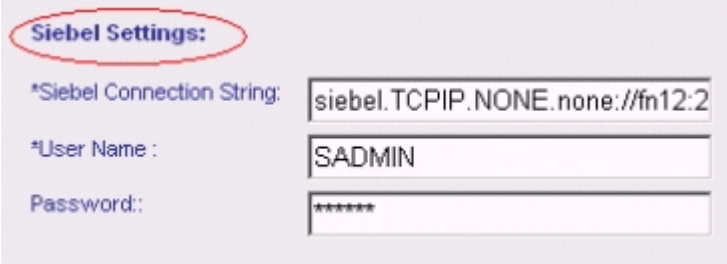
User Name: Specify the user name to be used to login into the preferred FileNET library. This value is required only when **SSO mode** is disabled i.e. is not checked.

Password: Specify the password for the user mentioned above. This credential is required only when **SSO mode** is disabled, by CIS application to login into the preferred FileNET library.

Group: Specify the group in the preferred FileNET Library to which the user belongs. Group name is required only if preferred library is CS library.

Note	User will be logged on to FileNET Library with the specified group or default group, if not specified.

Siebel Settings



Siebel Connect String: Siebel connection string is the connection string that is used to connect to Siebel server. Default connection string is

siebel.TCPIP.NONE.none://<SiebelServerName>:2320/siebel/SCCObjMgr/<SiebelServerName>

Replace <*SiebelServerName*> by actual Siebel Server name.

This connection string can be picked from appropriate application section of eapps.cfg file that lies in SWEApp folder under Siebel folder.

i.e. if CIS modules is integrated to Call Center application, pick up the connection string from [\Callcenter] section.

User Name: Specify Siebel user name which will be used to connect to Siebel.

Password: Specify password for the above-mentioned Siebel user. These credentials will be used to connect to Siebel.

To save the changes click on **Save.** To restore the previous settings click on **Cancel** button.

Note:	Close Configuration Tool and restart IIS to reflect the configuration changes in CIS application.

Changing password for Configuration tool

To change password for Configuration Tool administrator, launch the Configuration Tool screen. Enter valid logon credentials and click on **Change Password** button. Following screen will appear

Specify the new password in the **New Password** field and re-enter the new password in the **Confirm New Password** field. To save the new password, click on **Save**. To cancel the operation, click on **Cancel**.

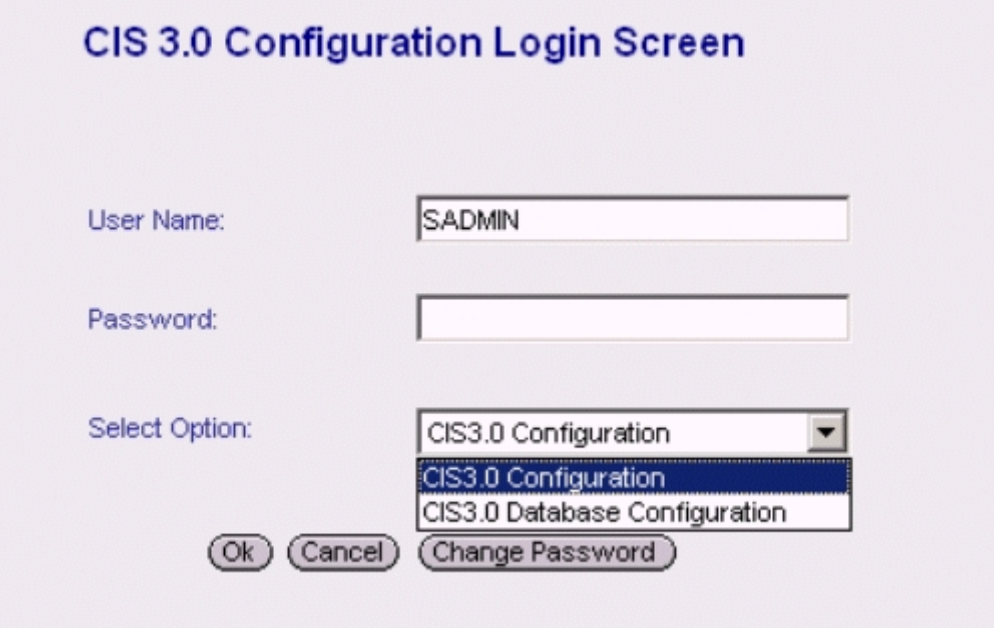
5
Database Configuration

Administrator must configure CIS database before using CIS 3.0 application. CIS application will allow operation on only those Siebel objects and FileNET objects that are configured in CIS 3.0 database.

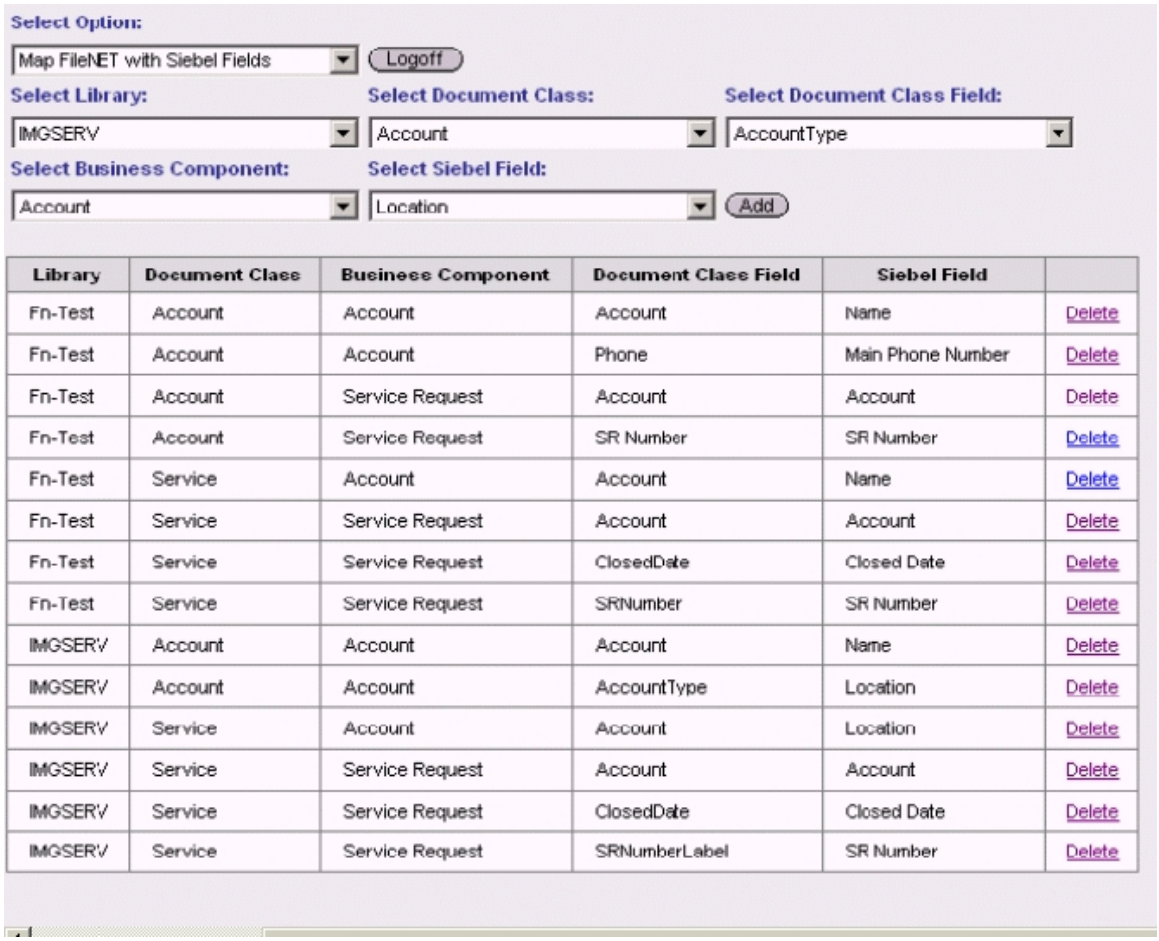
Following steps are required to configure CIS 3.0 database using database configuration tool

- Configure Siebel Fields
- Configure FileNET Fields
- Map FileNET with Siebel Fields
- Configure Parent Business Components

Database configuration tool can be accessed from CIS 3.0 configuration logon screen by selecting **CIS 3.0 Database Configuration** option from **Select option** drop down.



Enter valid logon credential and select CISS 3.0 Database configuration option in **Select Option** drop down and click on **Ok** button. Following screen will appear.



Library	Document Class	Business Component	Document Class Field	Siebel Field	
Fn-Test	Account	Account	Account	Name	Delete
Fn-Test	Account	Account	Phone	Main Phone Number	Delete
Fn-Test	Account	Service Request	Account	Account	Delete
Fn-Test	Account	Service Request	SR Number	SR Number	Delete
Fn-Test	Service	Account	Account	Name	Delete
Fn-Test	Service	Service Request	Account	Account	Delete
Fn-Test	Service	Service Request	ClosedDate	Closed Date	Delete
Fn-Test	Service	Service Request	SRNumber	SR Number	Delete
IMGSERV	Account	Account	Account	Name	Delete
IMGSERV	Account	Account	AccountType	Location	Delete
IMGSERV	Service	Account	Account	Location	Delete
IMGSERV	Service	Service Request	Account	Account	Delete
IMGSERV	Service	Service Request	ClosedDate	Closed Date	Delete
IMGSERV	Service	Service Request	SRNumberLabel	SR Number	Delete

This screen facilitates user to view and configure mapping between FileNET fields and Siebel fields that are configured for CIS 3.0 application.

Steps to map FileNET with Siebel Fields is explained later in the section **"Map FileNET with Siebel Fields"**

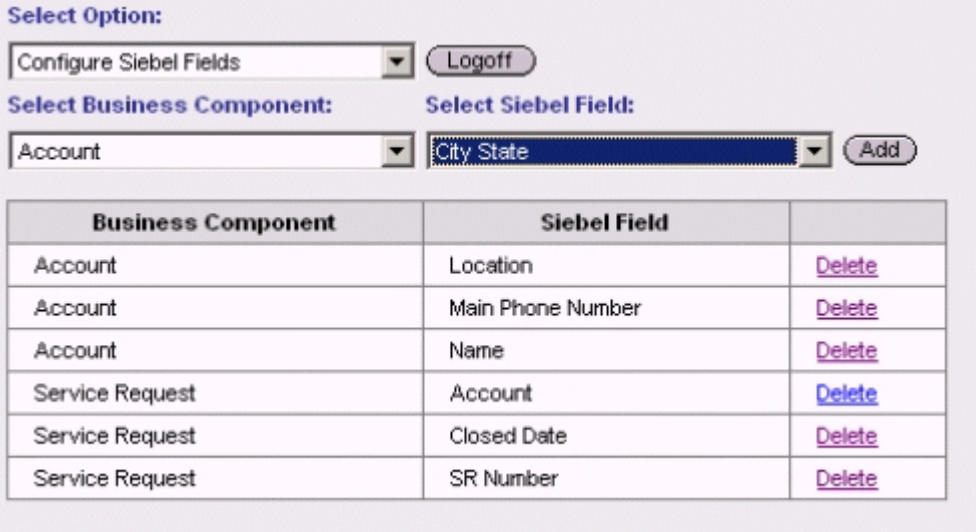
Following are the configurations required for CIS application

Configure Siebel Fields

CIS application works on two Siebel objects: Siebel Business component and Siebel business component field. CIS can perform operation on only those Siebel objects, which are configured in CIS database.

Database configuration tool provides interface to configure Siebel Objects.

Select **Configure Siebel Fields** option from **Select option** drop down. Following screen will appear.



This screen shows existing configured business component name and business component fields in the list view.

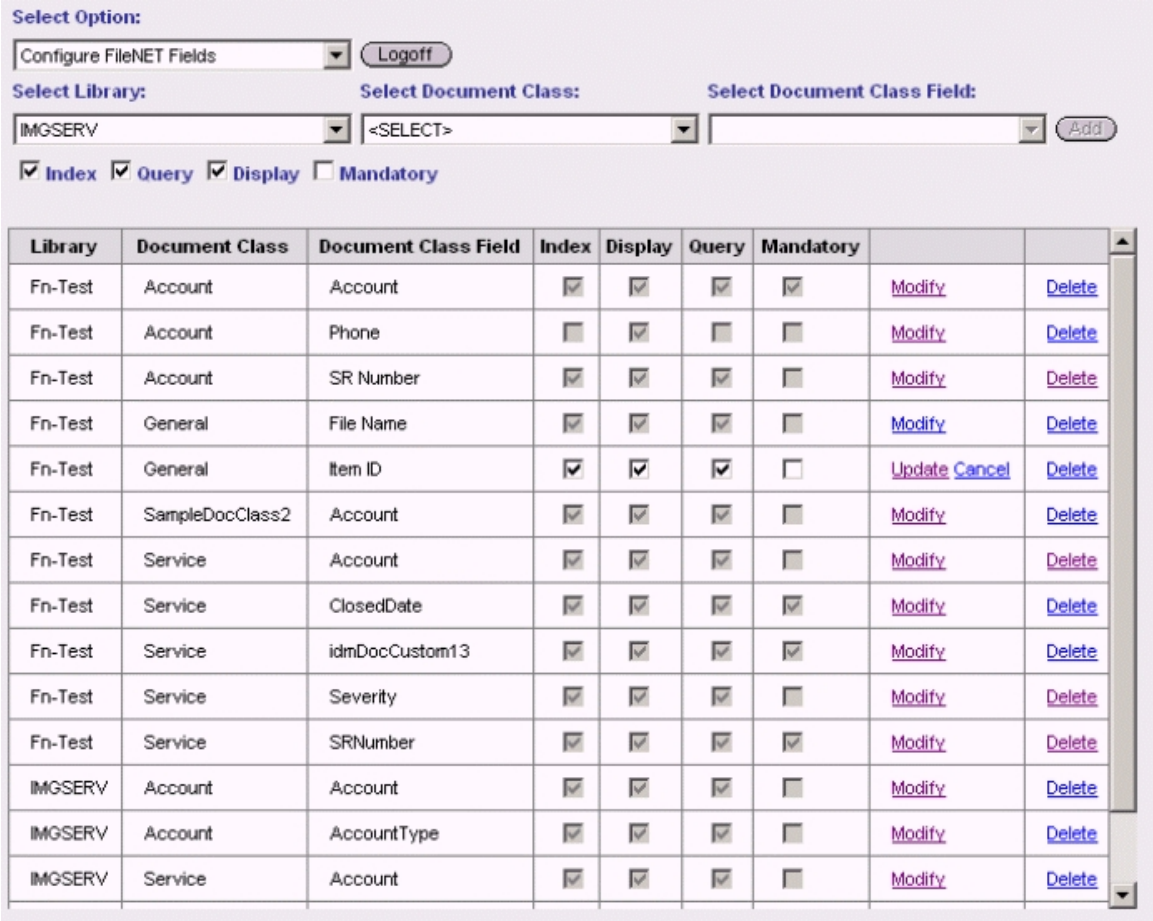
To configure Siebel objects for CIS database, follow these instructions

- Select Business Component name from **Select Business Component** drop down.
- Select Business component field name from **Select Siebel Field** drop down. This drop down contains all Siebel field pertaining to the selected Business Component.
- Click on **Add** button. Selected business component and business component field will get configured and selected pair will be added into the list view.
- To delete a configured Siebel Business Component field from CIS database, select the respective row and click on **Delete** link. Selected row will be deleted from the list view.

Configure FileNET Fields

CIS application works with the following IDM objects: FileNET library, Document class and document class field. CIS application can perform operation on only those FileNET objects, which are configured in CIS database

Select **Configure FileNET Fields** option from **Select Option** drop down. Following screen will come up.



Library	Document Class	Document Class Field	Index	Display	Query	Mandatory		
Fn-Test	Account	Account	☑	☑	☑	☑	Modify	Delete
Fn-Test	Account	Phone	☐	☑	☐	☐	Modify	Delete
Fn-Test	Account	SR Number	☑	☑	☑	☐	Modify	Delete
Fn-Test	General	File Name	☑	☑	☑	☐	Modify	Delete
Fn-Test	General	Item ID	☑	☑	☑	☐	Update Cancel	Delete
Fn-Test	SampleDocClass2	Account	☑	☑	☑	☐	Modify	Delete
Fn-Test	Service	Account	☑	☑	☑	☐	Modify	Delete
Fn-Test	Service	ClosedDate	☑	☑	☑	☑	Modify	Delete
Fn-Test	Service	idmDocCustom13	☑	☑	☑	☑	Modify	Delete
Fn-Test	Service	Severity	☑	☑	☑	☐	Modify	Delete
Fn-Test	Service	SRNumber	☑	☑	☑	☑	Modify	Delete
IMGSERV	Account	Account	☑	☑	☑	☐	Modify	Delete
IMGSERV	Account	AccountType	☑	☑	☑	☐	Modify	Delete
IMGSERV	Service	Account	☑	☑	☑	☐	Modify	Delete

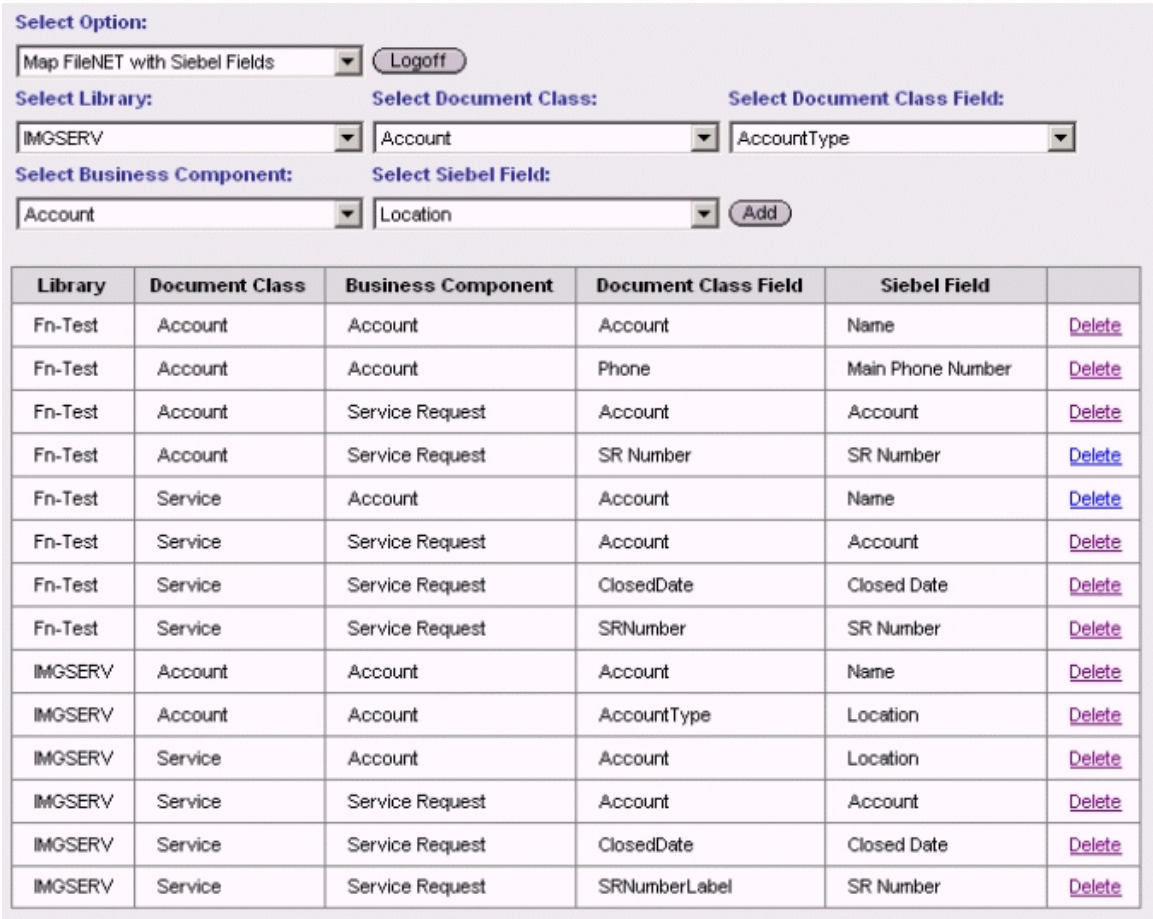
All configured libraries, document classes and document class fields will appear in the list view.

To configure FileNET objects, follow these instructions

- Select a FileNET library from **Select Library** drop down.
- Select Document class from **Select Document Class** drop down. This drop down contains all document classes pertaining to the selected FileNET library.
- Select document class field from **Select Document Class Field** drop down. This drop down will contain all document class fields pertaining to the selected document class and library combination.
- Click on **Add** button. Selected library, document class and document class field will get configured and selected pair will get added into the data grid.
- To delete a configured document class field from CIS database, select respective row from the data grid and click on **Delete** Link. Selected row will be deleted from the data grid

Map FileNET with Siebel Fields

Select **Map FileNET with Siebel Fields** option. Following screen will come up.



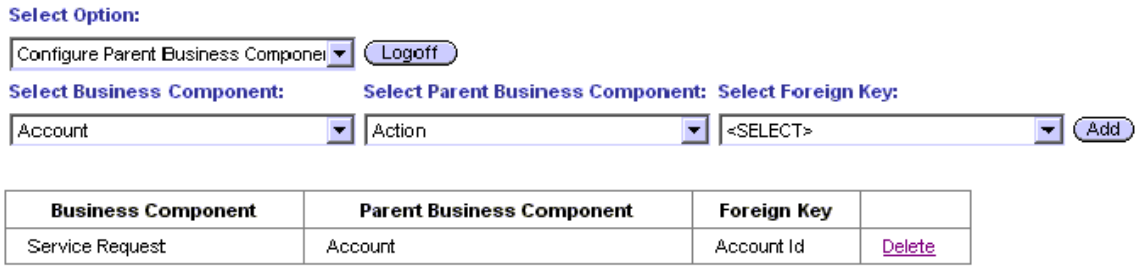
Library	Document Class	Business Component	Document Class Field	Siebel Field	
Fn-Test	Account	Account	Account	Name	Delete
Fn-Test	Account	Account	Phone	Main Phone Number	Delete
Fn-Test	Account	Service Request	Account	Account	Delete
Fn-Test	Account	Service Request	SR Number	SR Number	Delete
Fn-Test	Service	Account	Account	Name	Delete
Fn-Test	Service	Service Request	Account	Account	Delete
Fn-Test	Service	Service Request	ClosedDate	Closed Date	Delete
Fn-Test	Service	Service Request	SRNumber	SR Number	Delete
IMGSERV	Account	Account	Account	Name	Delete
IMGSERV	Account	Account	AccountType	Location	Delete
IMGSERV	Service	Account	Account	Location	Delete
IMGSERV	Service	Service Request	Account	Account	Delete
IMGSERV	Service	Service Request	ClosedDate	Closed Date	Delete
IMGSERV	Service	Service Request	SRNumberLabel	SR Number	Delete

To map FileNET with Siebel fields, follow these instructions

- Select library name, document class and document class field from **Select Library**, **Select document class** and **Select document class Field** drop downs respectively.
- Select business component name and business component field name from **Select business Component**, **Select Business Component Field** drop downs respectively.
- Click on **Add** button. FileNET field and Siebel field will get mapped and mapped FileNET-Siebel object pair will get added to the data grid.
- In order to delete mapping between a Siebel Business Component field and Document class field, select the map row from the data grid and click on **Delete** link, mapping will be deleted and row will be deleted from the data grid.

Configure Parent Business Component

CIS 3.0 application allows to link documents to parent business component of the selected business component. To configure parent Business Component for a configured business component, select **Configure Parent Business Component** option. Following screen will appear.



The above screen shows configured parent business component and its foreign keys for a configured business component.

To configure parent business component for a configured business component, follow these instructions

- Select configured Siebel business component from **Select Business Component** drop down.
- Select parent business component from **Select Parent Business Component** drop down.
- Select a foreign key from **Select Foreign key** drop down.
- Click on **Add** button. For the selected Business Component, parent business component will be configured along with its foreign key. Selected business component, parent business component and foreign key pair will get added to the list view.
- To delete a configured foreign key for a Business component and parent business component pair, click on **Delete** link. Entry will be deleted from the list view.

To go back to CIS 3.0 Configuration Tool home page, click on **Logoff** button.

6
CIS-Siebel Integration

In order to integrate CIS modules inside Siebel Call Center application interface, following steps will need to be performed.

Importing Custom CIS Objects – This process will import custom CIS objects in Siebel repository

Importing CIS Scripts – This process will import custom CIS scripts in Siebel repository.

Copying web template - CIS applets are based on custom CIS web templates. In order to use these templates, templates should be copied in < system drive > /sea703/siebsrvr/webtempl

Set CISVBC as Business Object component to Service Request Business Object – In order to integrate CIS views inside Service screen, CIS VBC should be set as business object component to Service Request business object.

Adding CIS Views to Service Request Screen – This process explains how to integrate CIS views in Service request screen

Compiling the repository - This process is required to get the custom objects reflected in the repository

Starting Siebel services - Siebel service should be restarted after importing the custom objects

Enabling CIS Views - In order to make CIS views visible to the user, these views should be enabled and user should be given responsibility to view those. This process explains how to enable the views.

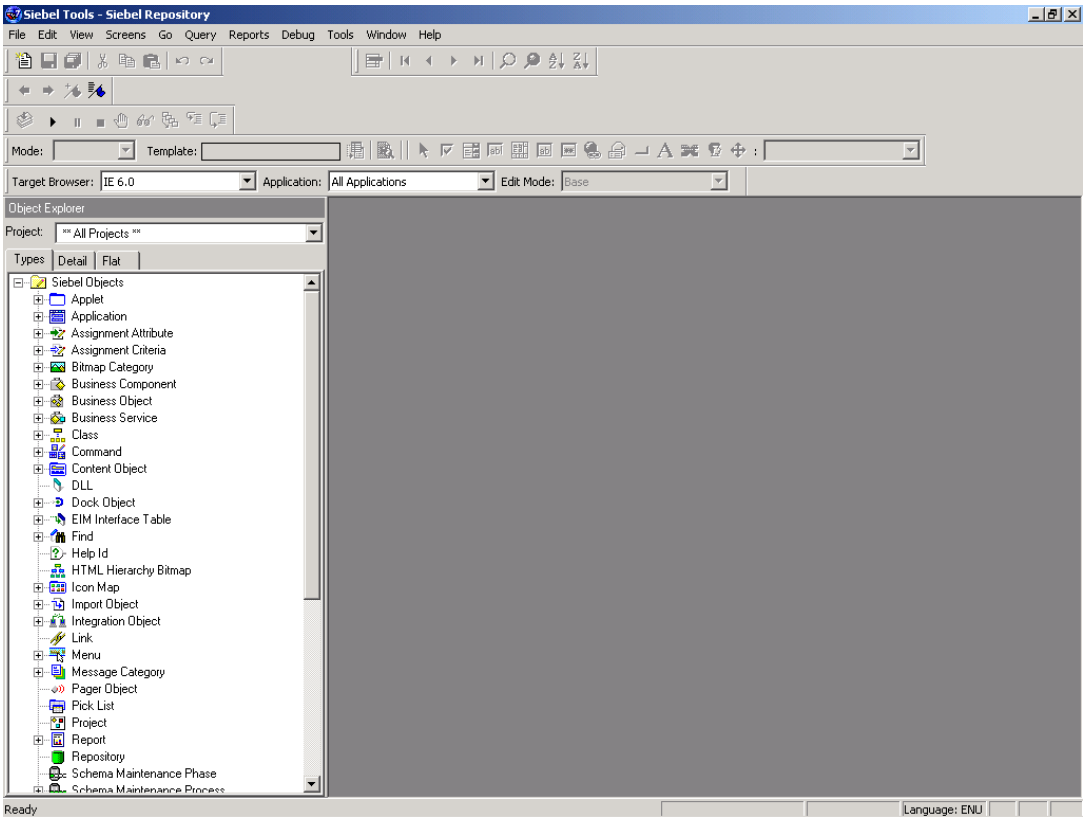
Assigning responsibility to the User – This process explains how to assign responsibility to the users so that they can view CIS views.

I. From the Start menu of Windows explorer, select Program-> Siebel Tools 7.0.4->Siebel Tools.

II. Provide valid Siebel credentials.

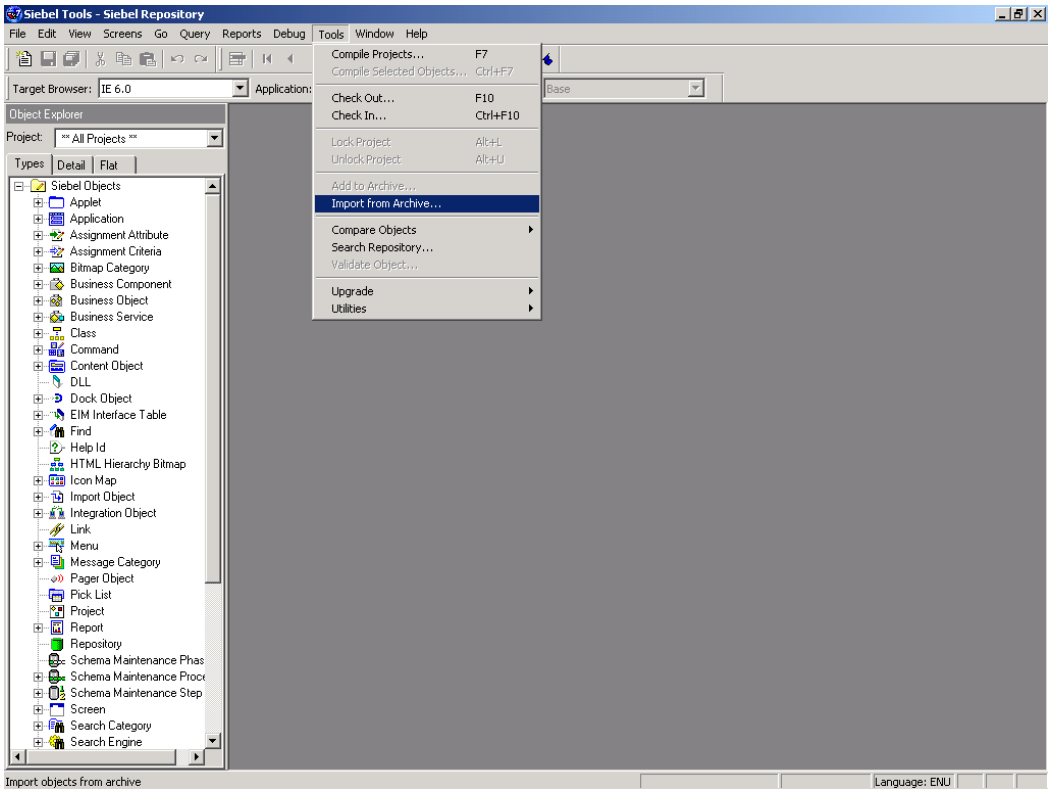
III. Select Connect to as **Server**

IV. Click on **Ok** button

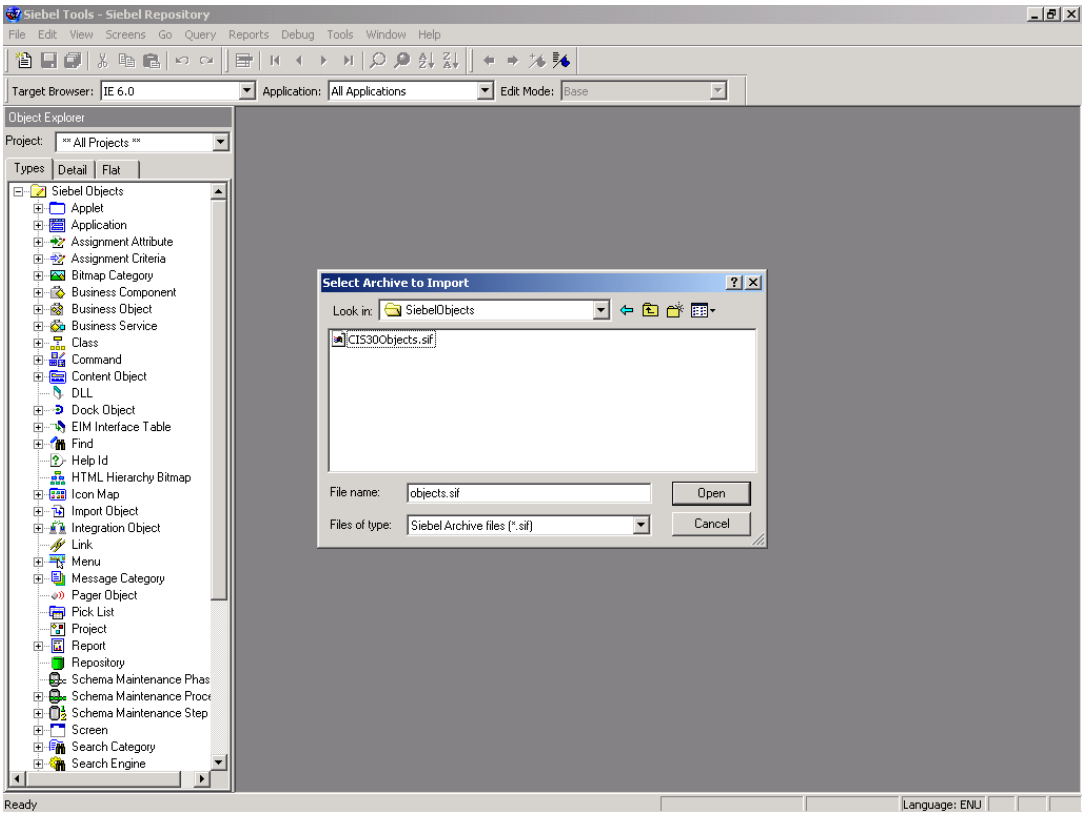


Importing Custom CIS Objects

I. In Siebel Tools interface navigate to Tools -> Import from Archive

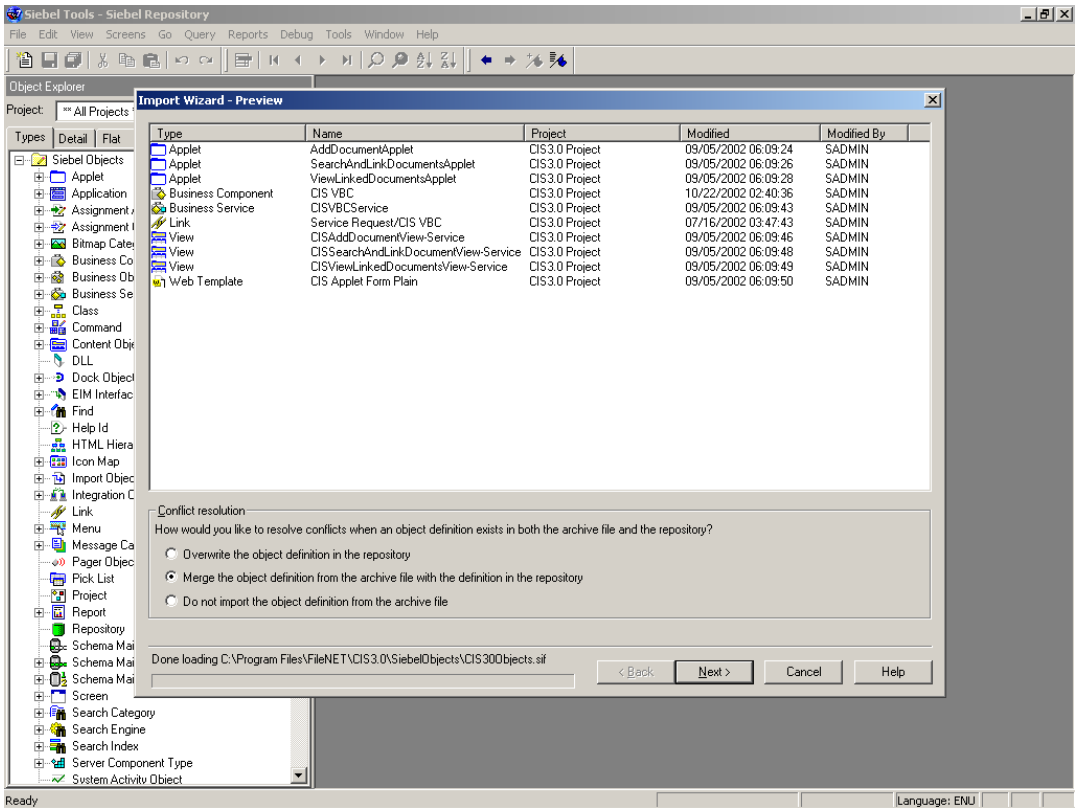


II. Select CIS30Objectss.sif archive file from **SiebelObjects** subfolder under <Systemdrive>:\ProgramFiles\FileNET\CIS3.0 folder. This folder is created during CIS 3.0 installation on Siebel server and must exist.



III. Click on **Open** button

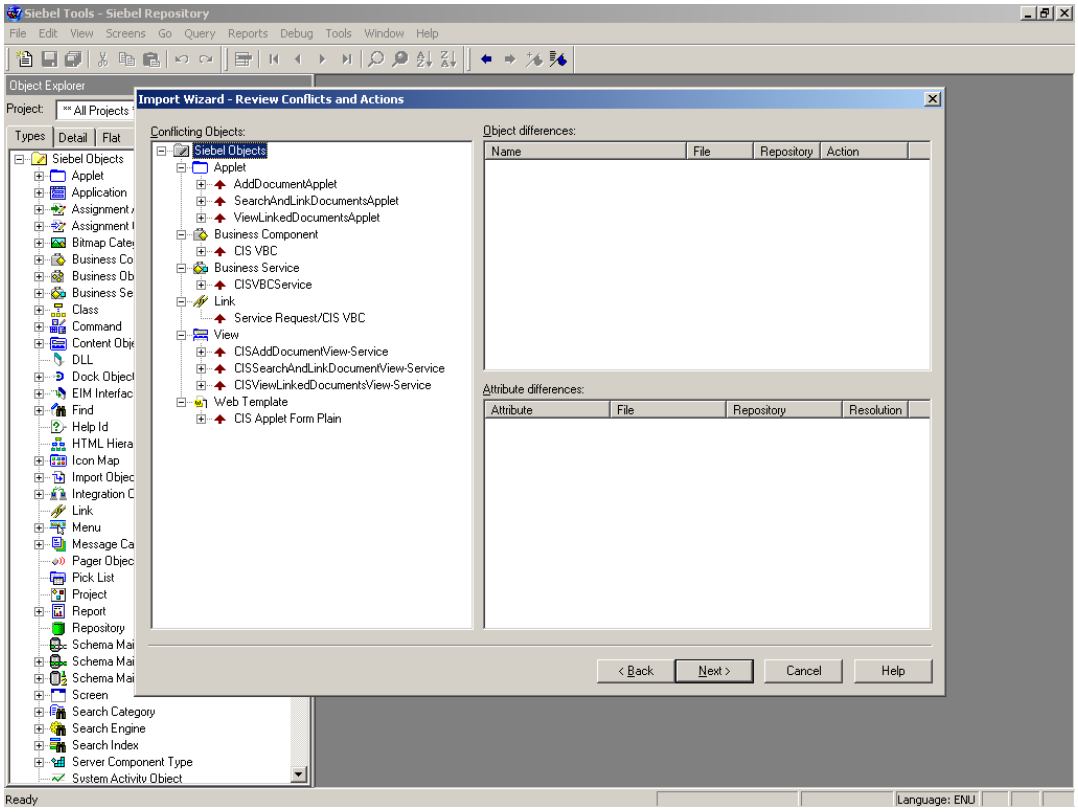
IV. **Import wizard** screen comes up



V. Select option **Merge the object definition from the archive file with the definition in the repository**

VI. Click on **Next** button

VII. Following screen will appear



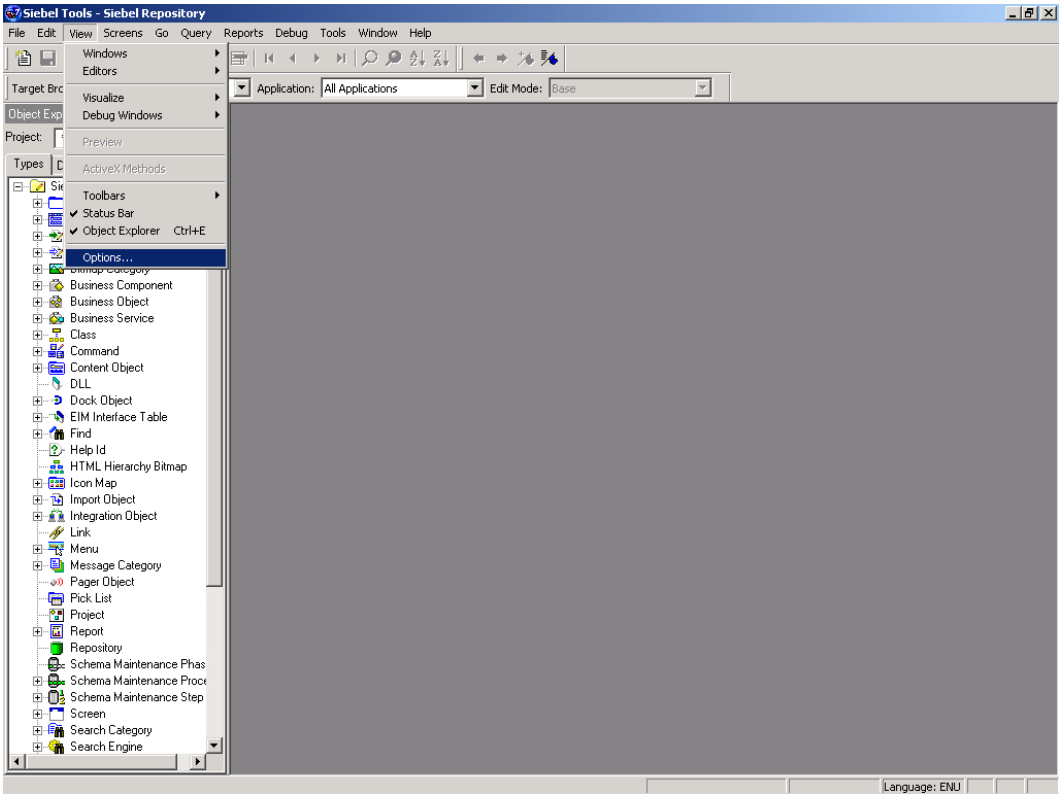
VIII. Click on **Next** button. A confirmation dialog box will come up

IX. To proceed, Click on **Yes** button

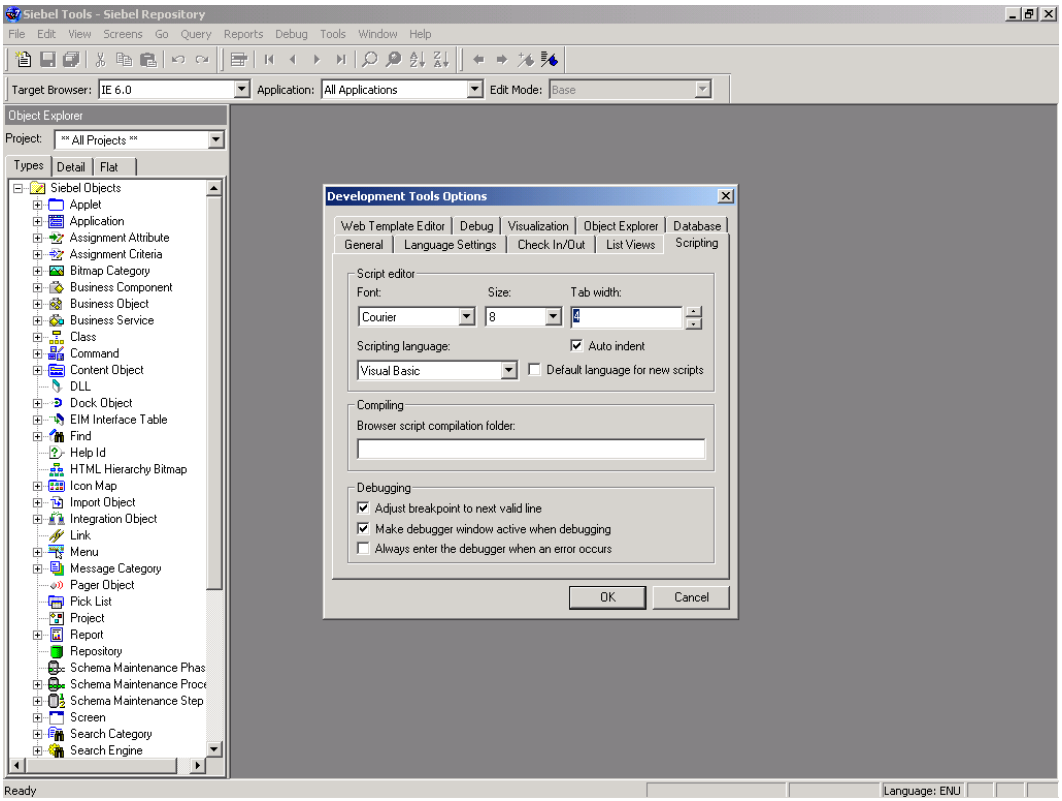
X. Objects will be uploaded in the Siebel server repository

Importing CIS Scripts

I. From Siebel Tools interface navigate to View->Options

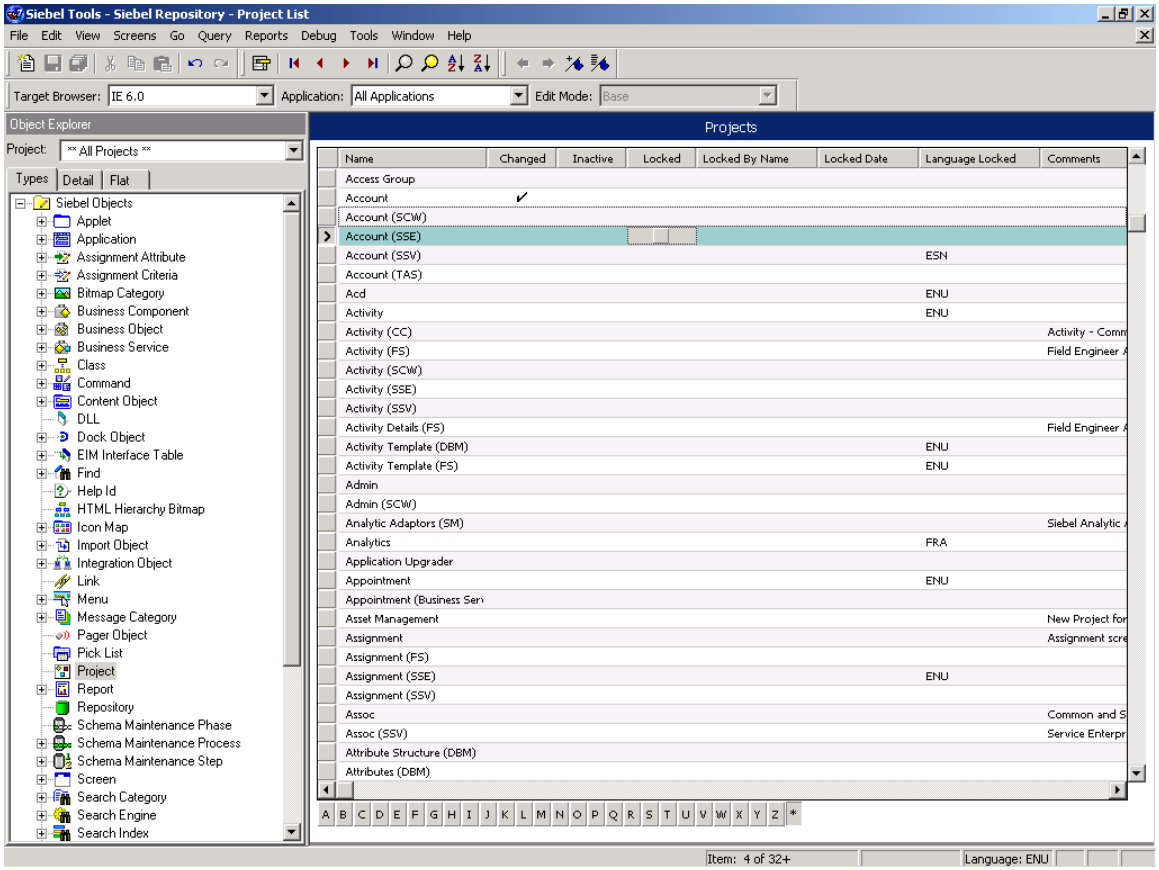


II. Select **Scripting** Tab and uncheck **Default Language for new scripts** check box



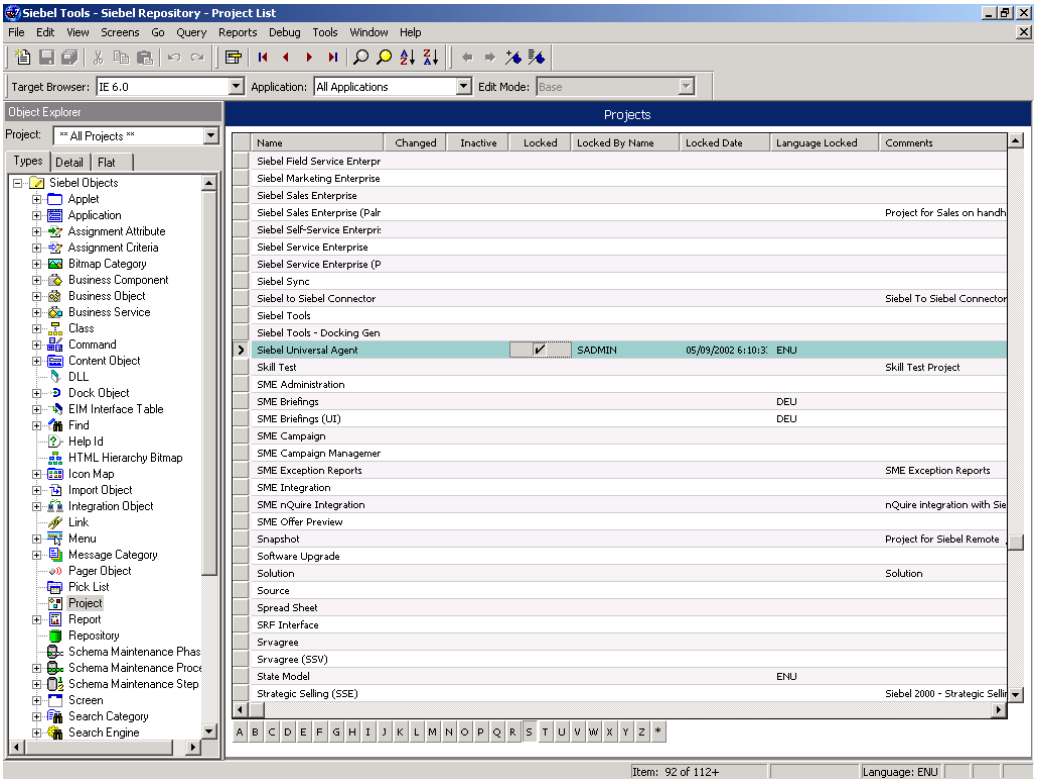
III. Click on **OK** button.

IV. From Object Explorer window of Siebel Tool, select object type **Project**



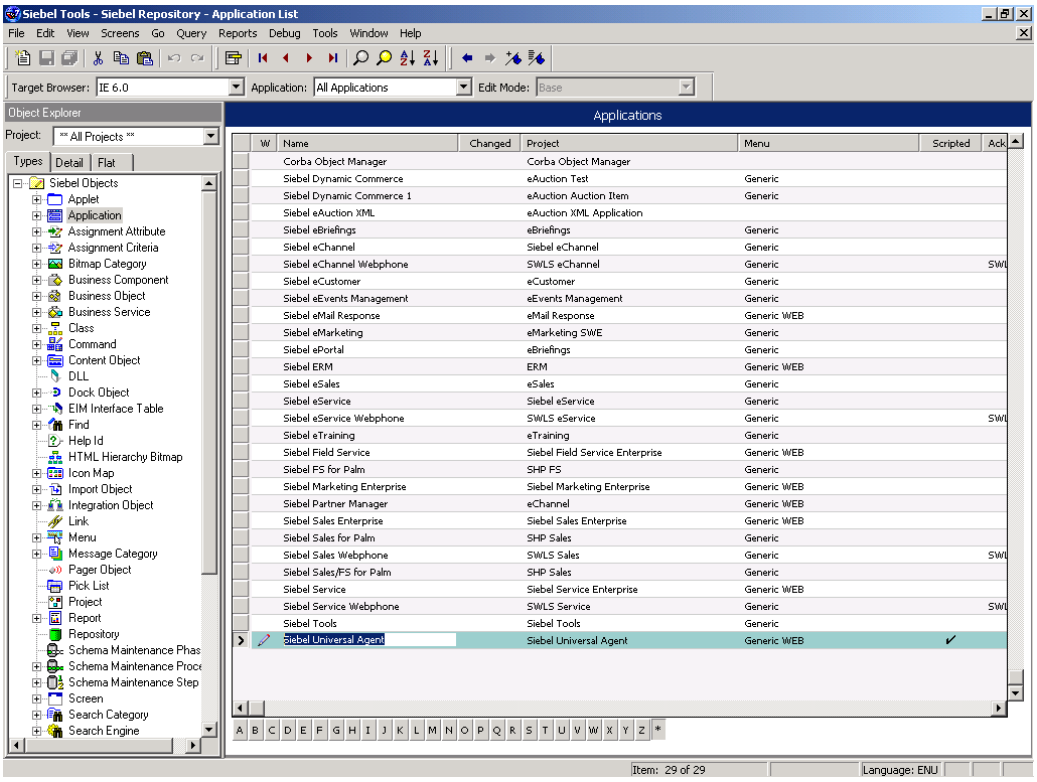
V. Select **Siebel Universal Agent** project From Object List Editor window in the right pane.

VI. Lock **Siebel Universal Agent** project by checking **Locked** column.

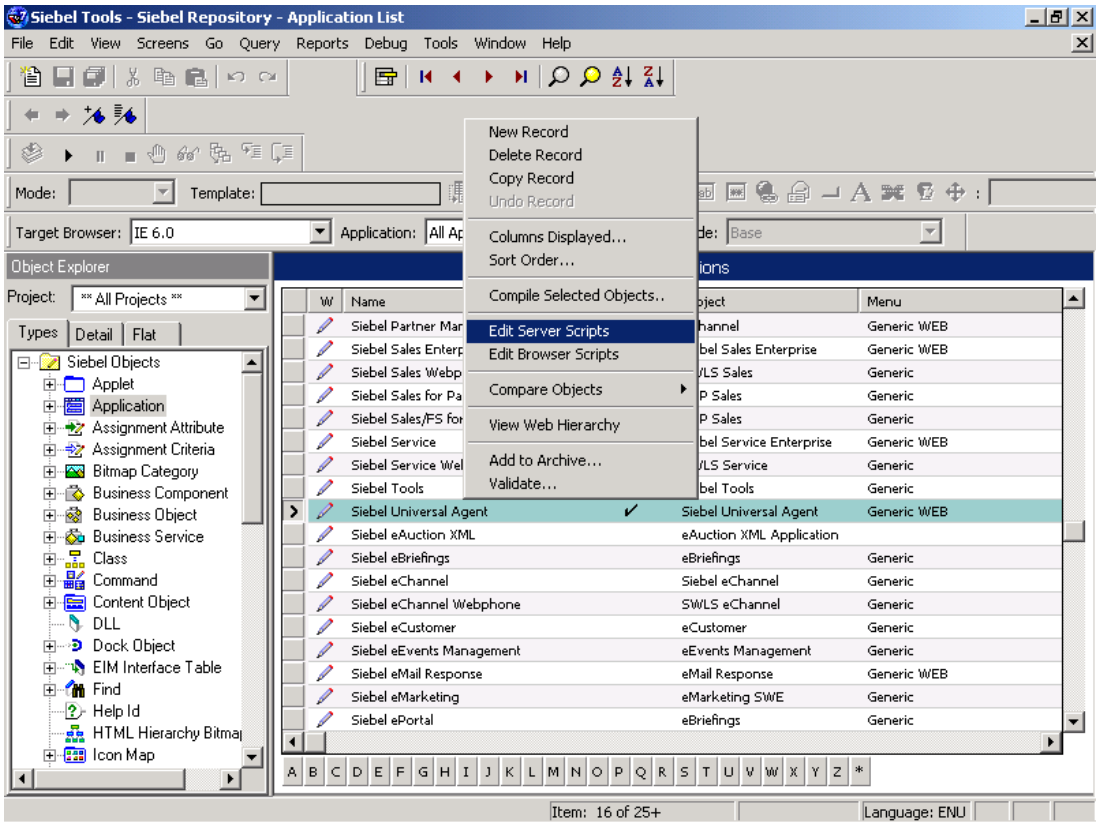


VII. From Object Explorer window, select object type **Application**

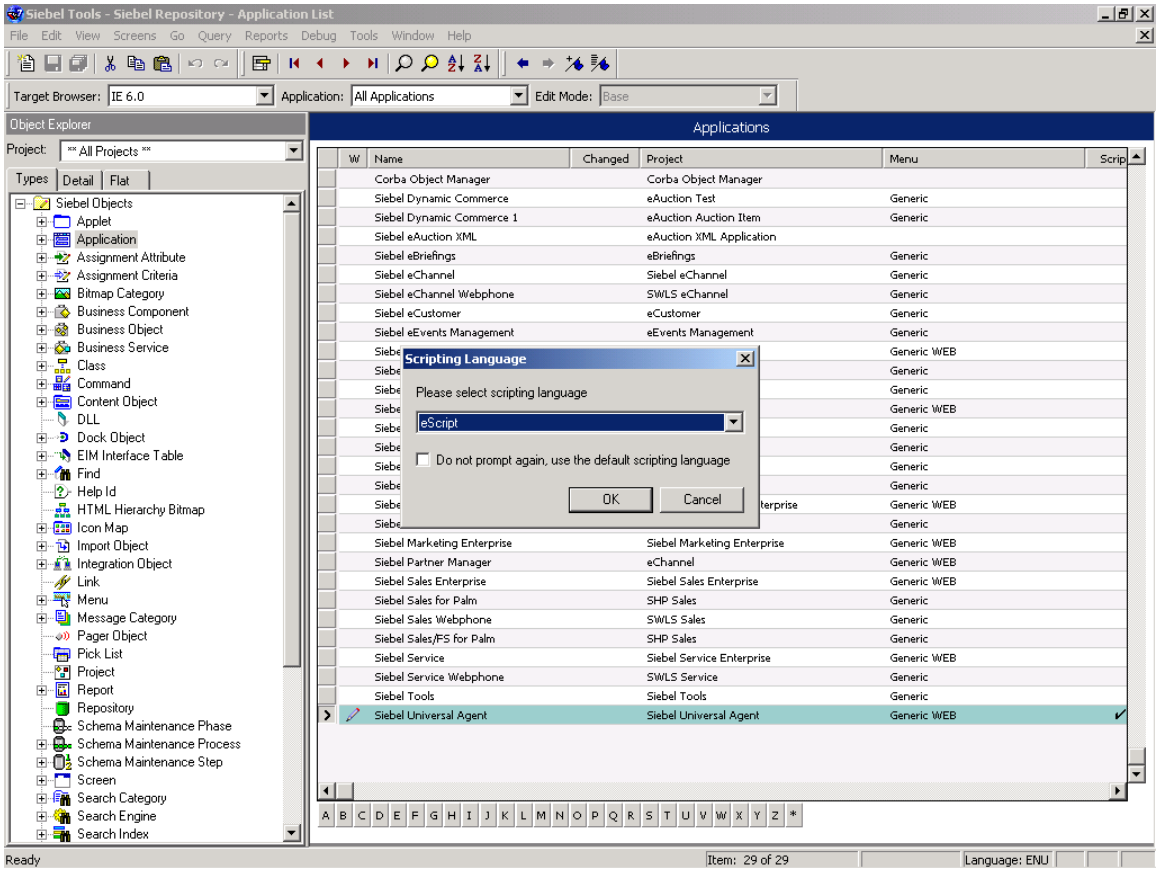
VIII. Select application **Siebel Universal Agent** From Object List Editor window in the right pane.



IX. Right click on the selected item and select **Edit Server scripts**

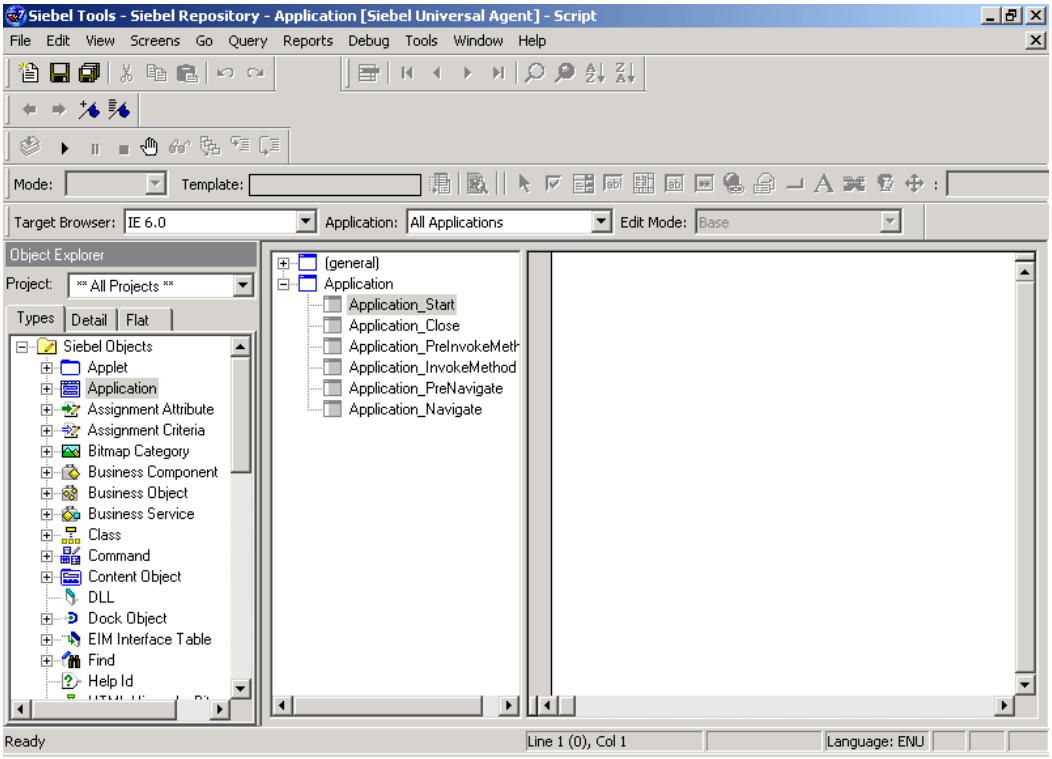


X. Scripting Language dialog box will appear.

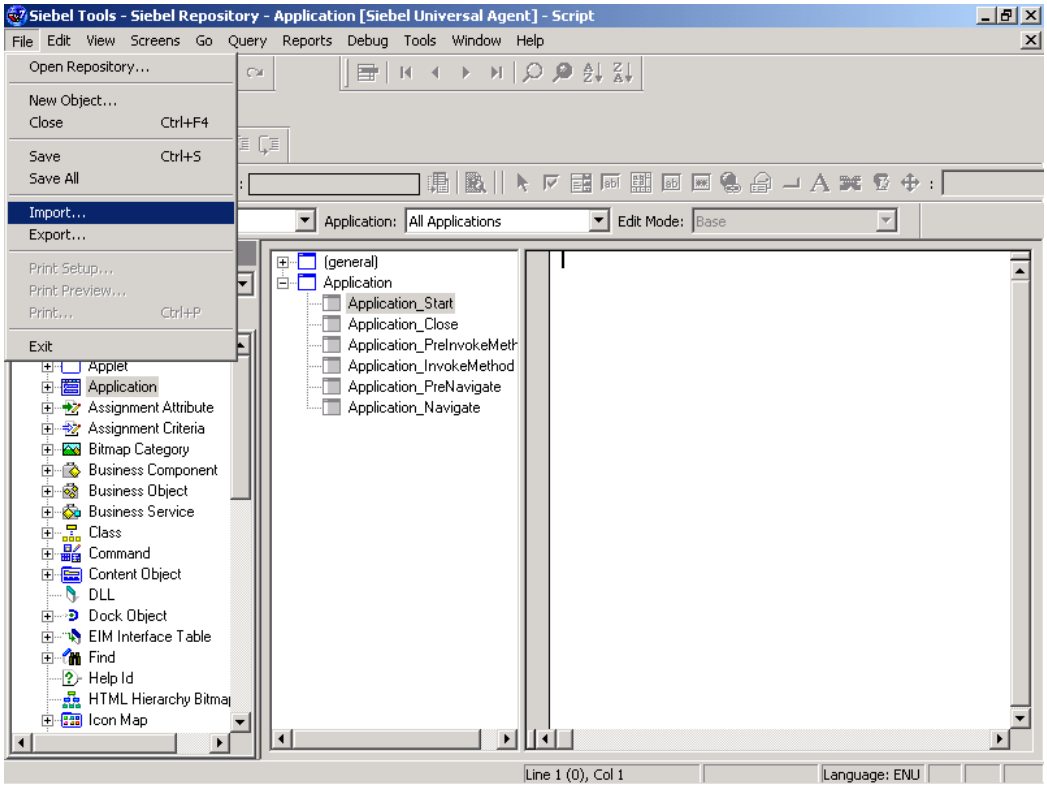


XI. Select **escript** as scripting language and click on **OK** button.

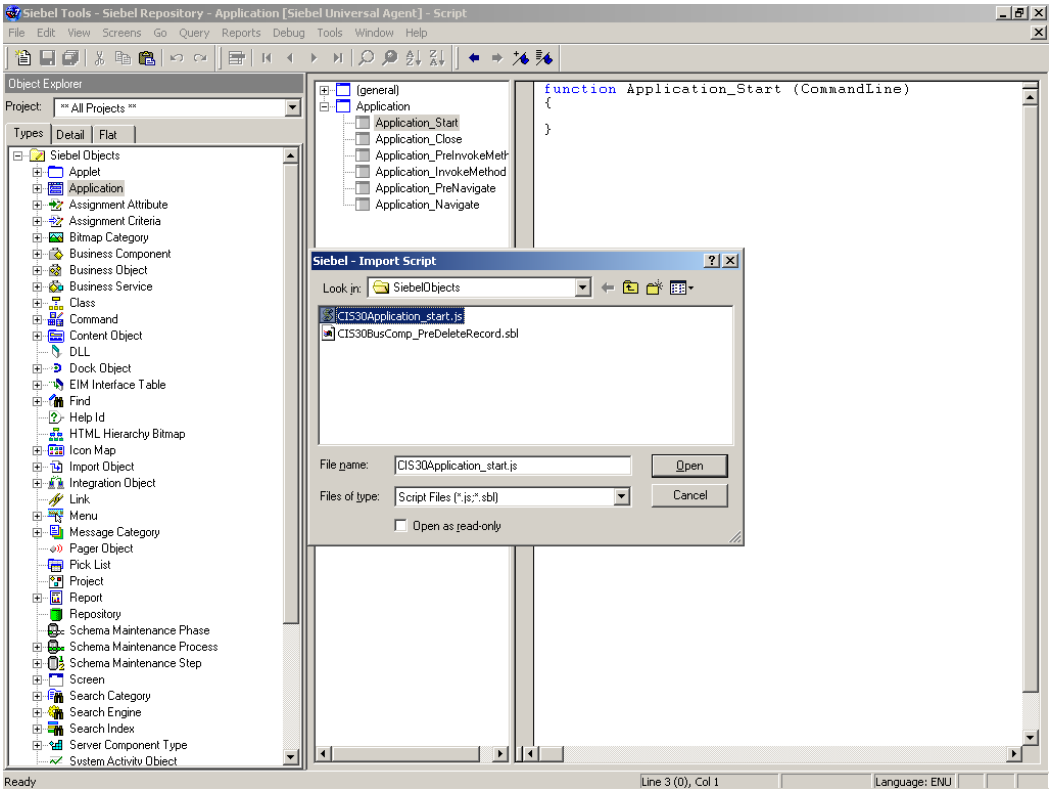
XII. From list of application events, select **Application_start**



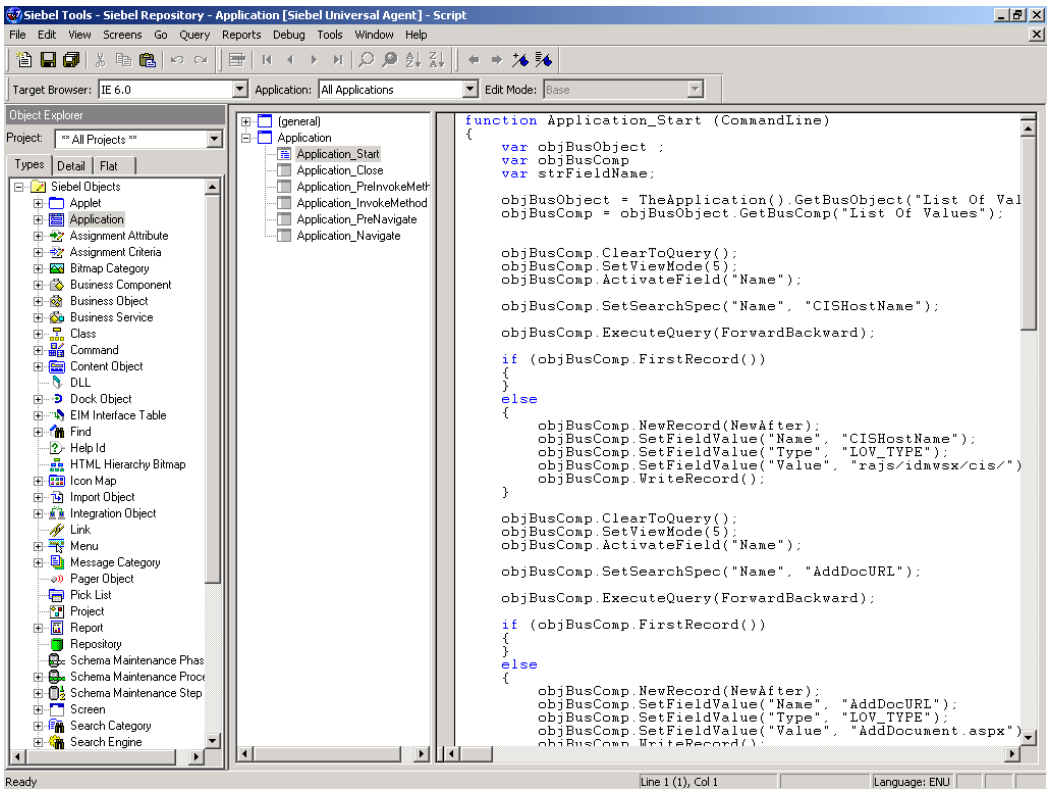
XIII. Navigate to File->Import



XI. Select CIS30Application_start.js file from **SiebelObjects** subfolder under <Systemdrive>:\ProgramFiles\FileNET\CIS3.0 folder.



XIV. Click on **Open** button. **Application_Start** function will be populated

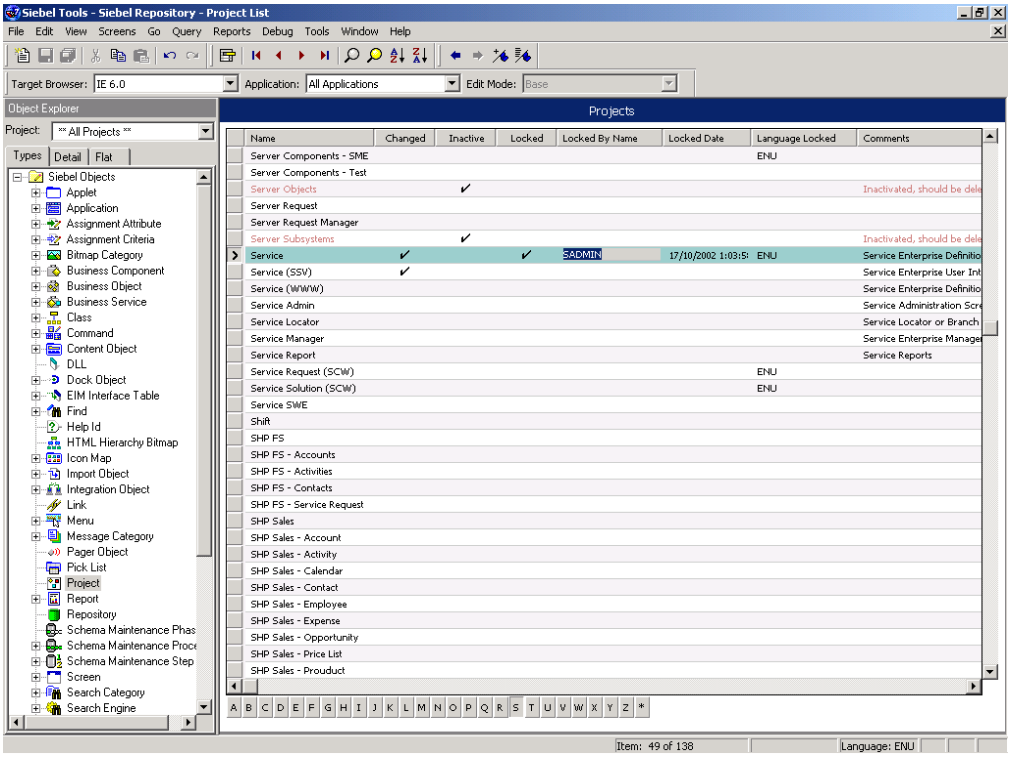


XV. Click on **Save** button.

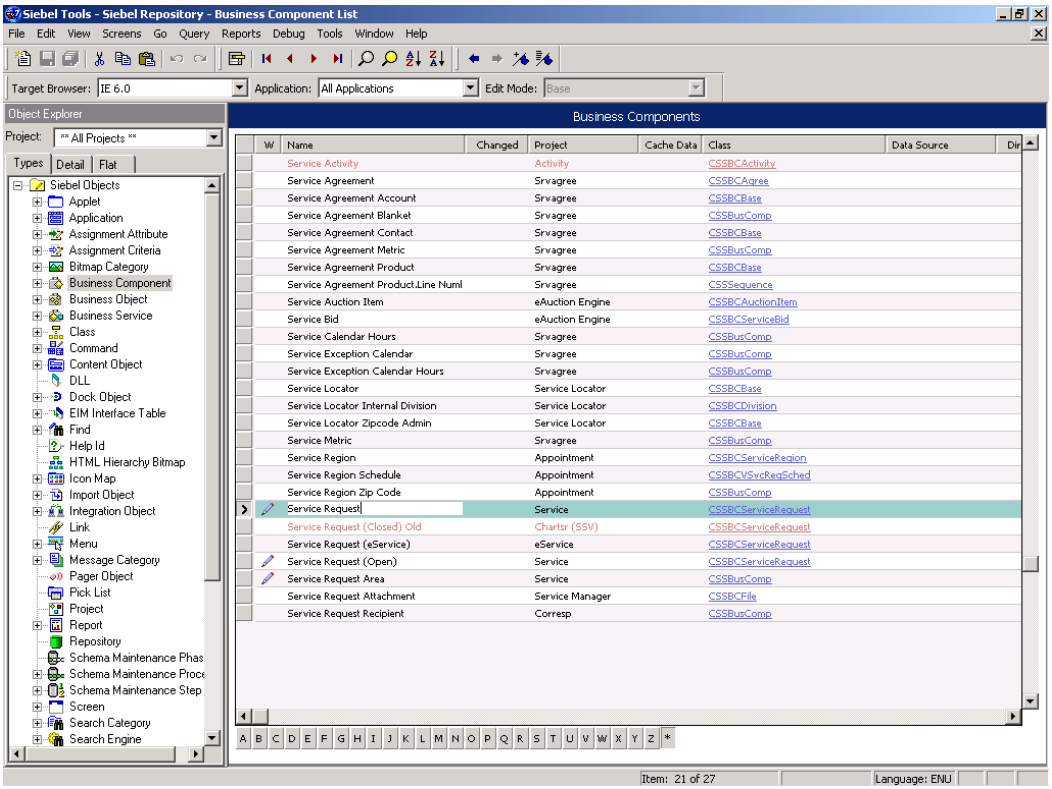
XVI. From Object Explorer window, select object type **Project**

XVII. Select **Service** project From Object List Editor window in the right pane.

XVIII. Lock **Service** project by checking **Locked** column.

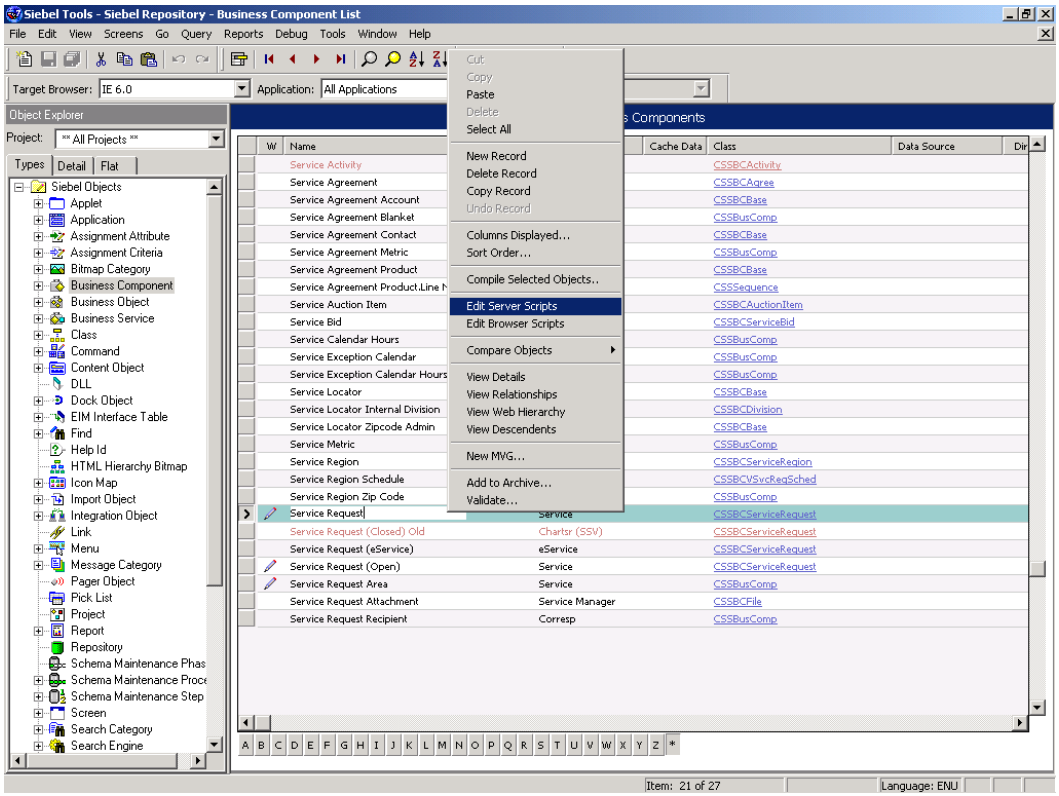


XIX. From Object Explorer window, select object type **Business Component**

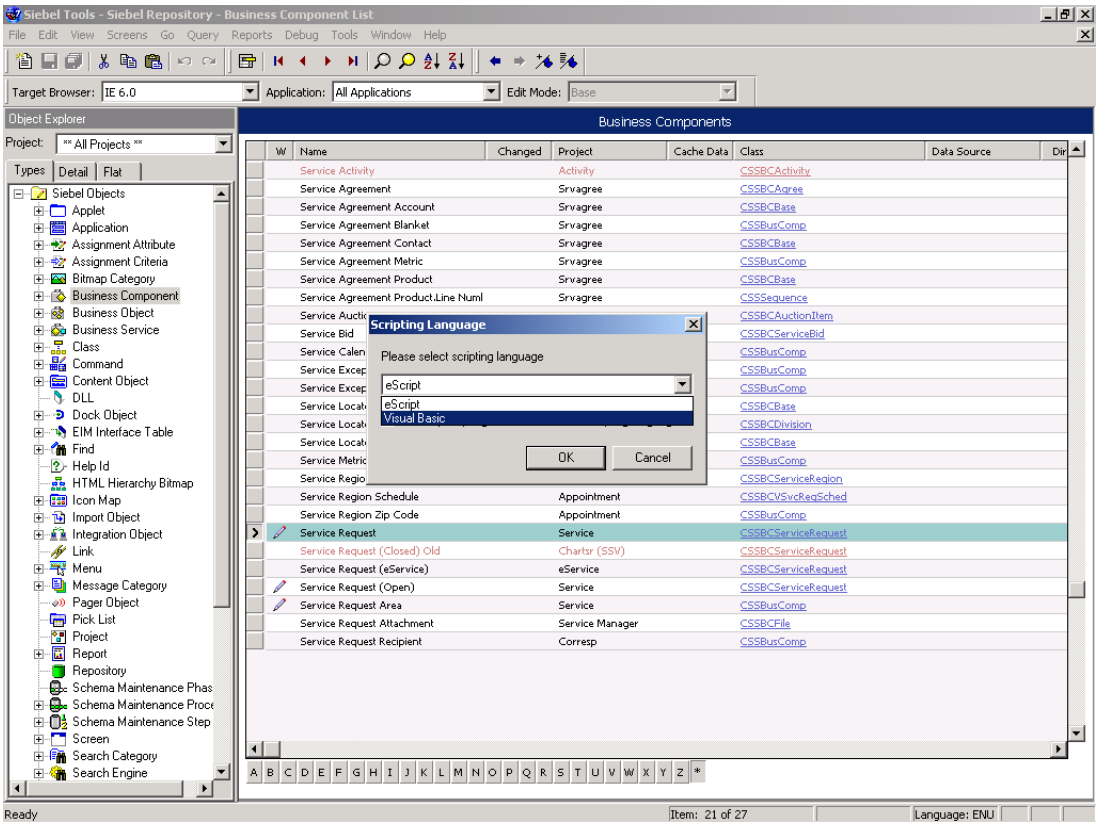


XX. Select **Service Request** Business Component from Object List Editor window in the right pane.

XXI. Right click and select **Edit server scripts.**

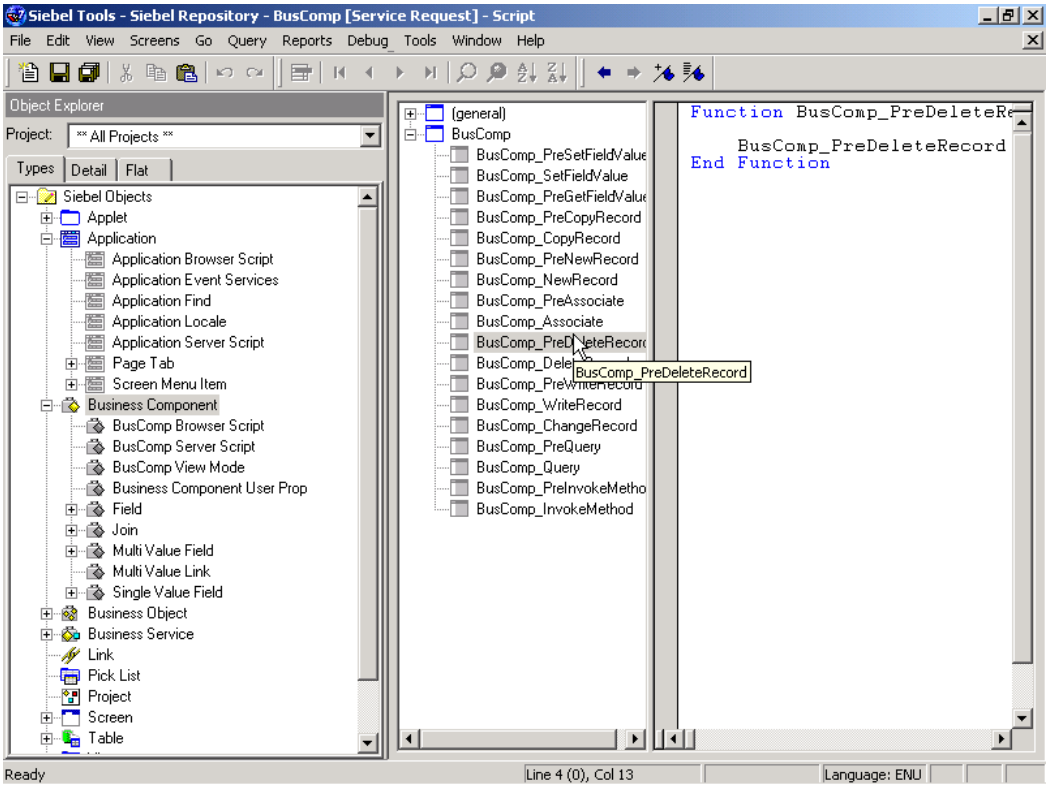


XXII. Scripting Language dialog box will appear.



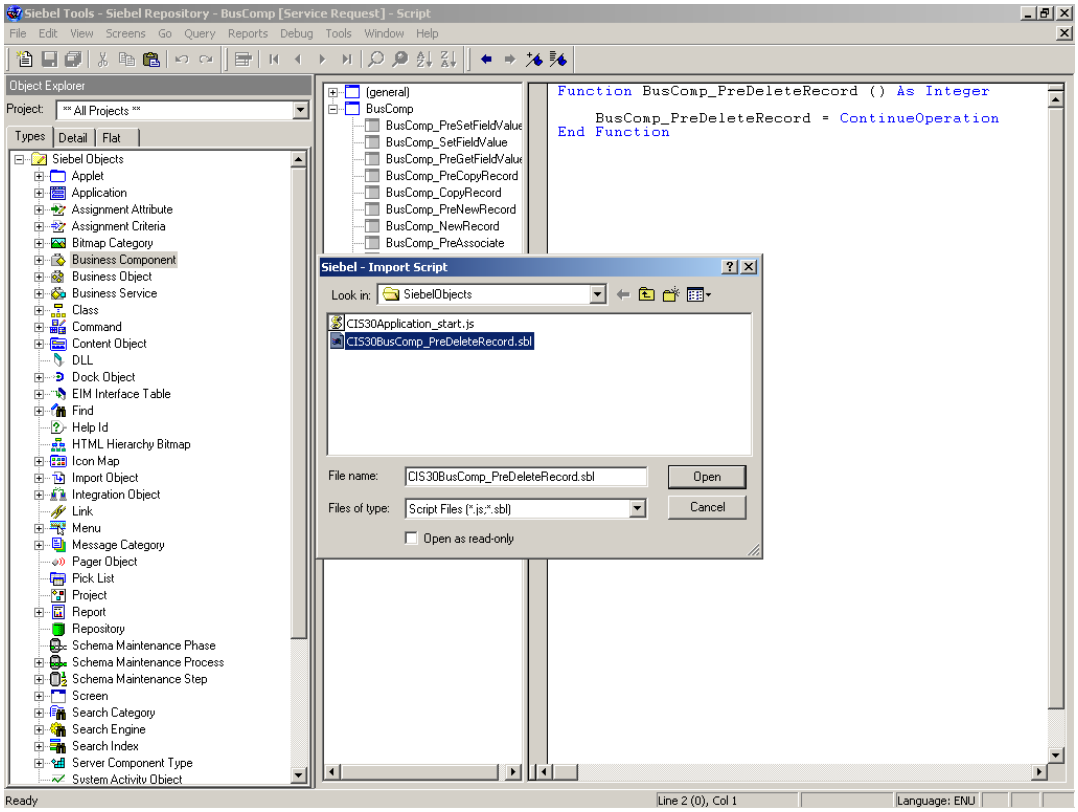
XXIII. Select Visual Basic as scripting language and click on **OK** button.

XXIV. Select **BusComp_PreDeleteRecord** event



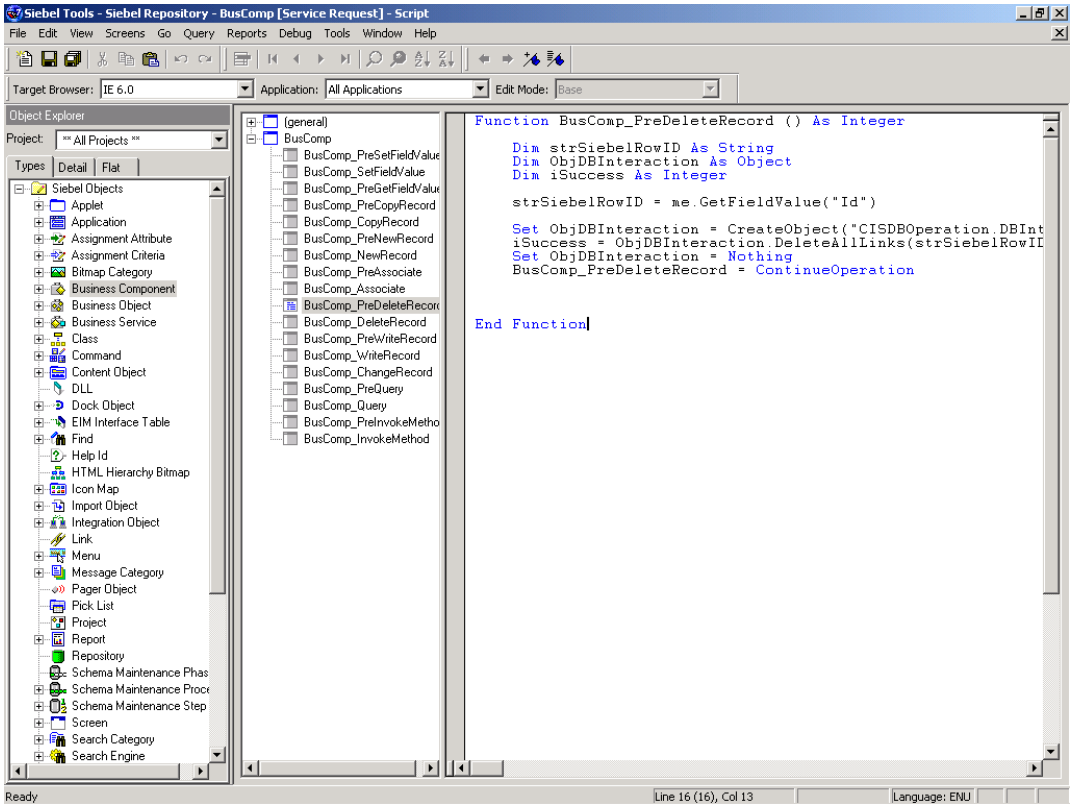
XXV. Navigate to File->import menu

XXVI. Select CIS30BusComp_PreDeleteRecord.sbl from SiebelObjects subfolder under <Systemdrive>:\ProgramFiles\FileNET\CIS3.0 folder.



XXVII. Click on **Open** button

XXVIII. **BusComp_PreDeleteRecord** () function will be populated



XXIX. Save the changes

Copying web template

I. Copy **CISCCFormbody.swt** file from file from SiebelObjects subfolder under <Systemdrive>:\ProgramFiles\FileNET\CIS3.0 folder to < system drive > /sea703/siebsrvr/webtempl

II. Copy **CISCCAppletFormPlain.swt** file from SiebelObjects subfolder under <Systemdrive>:\ProgramFiles\FileNET\CIS3.0 folder to < system drive > /sea703/siebsrvr/webtempl

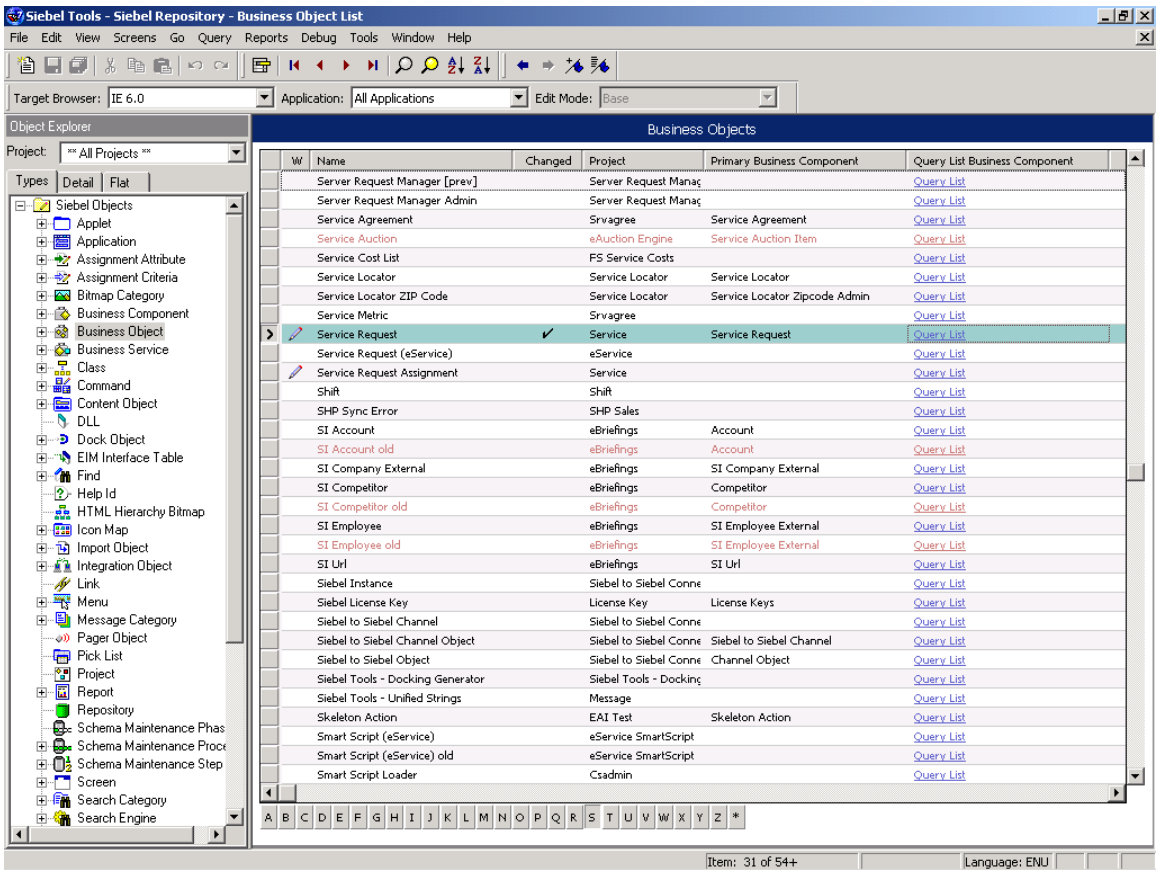
Note	In order to setup CIS application for dedicated web client, Copy web templates to < system drive > /sea703/Client/webtempl folder.

Set CIS VBC as Business Object Component to Service Request Business object

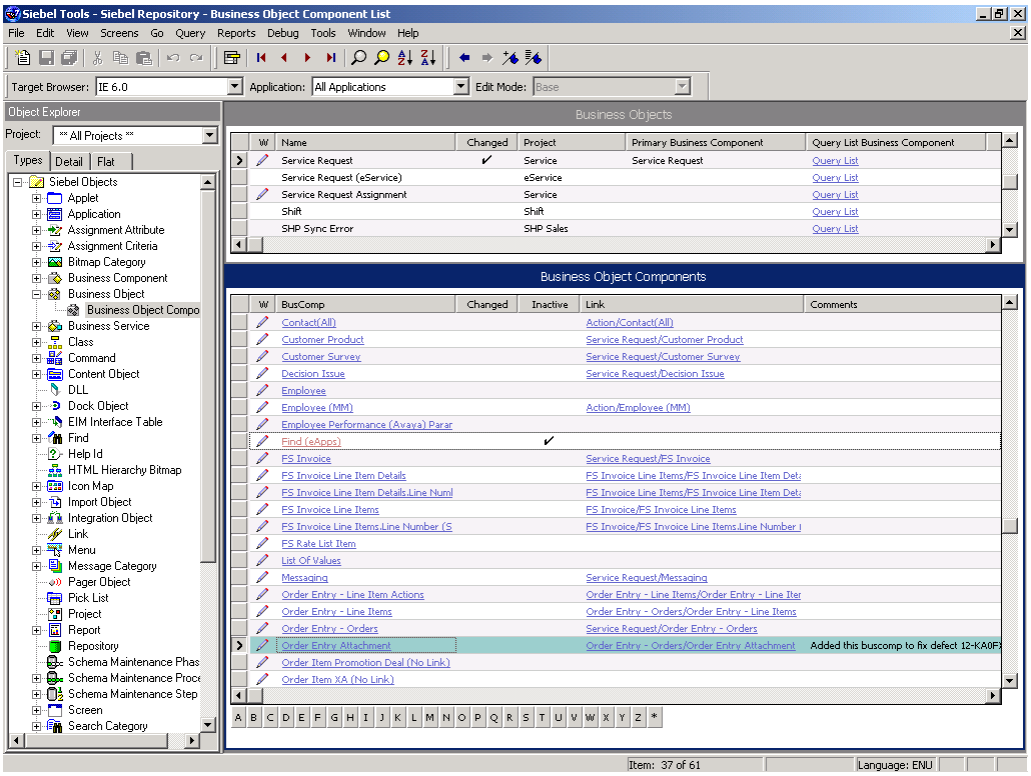
I. Ensure that **Service** project is locked.

II. From Object Explorer window, select object type **Business Object**

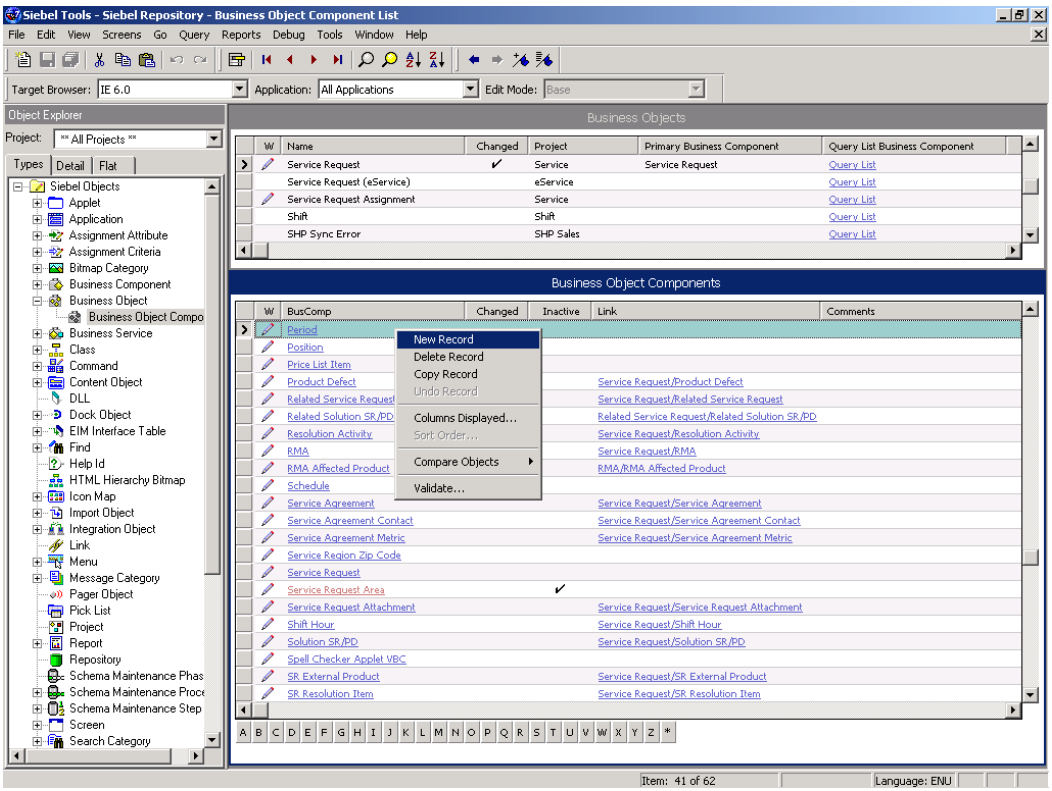
III. Select **Service Request** Business Object from Object List Editor window in the right pane.



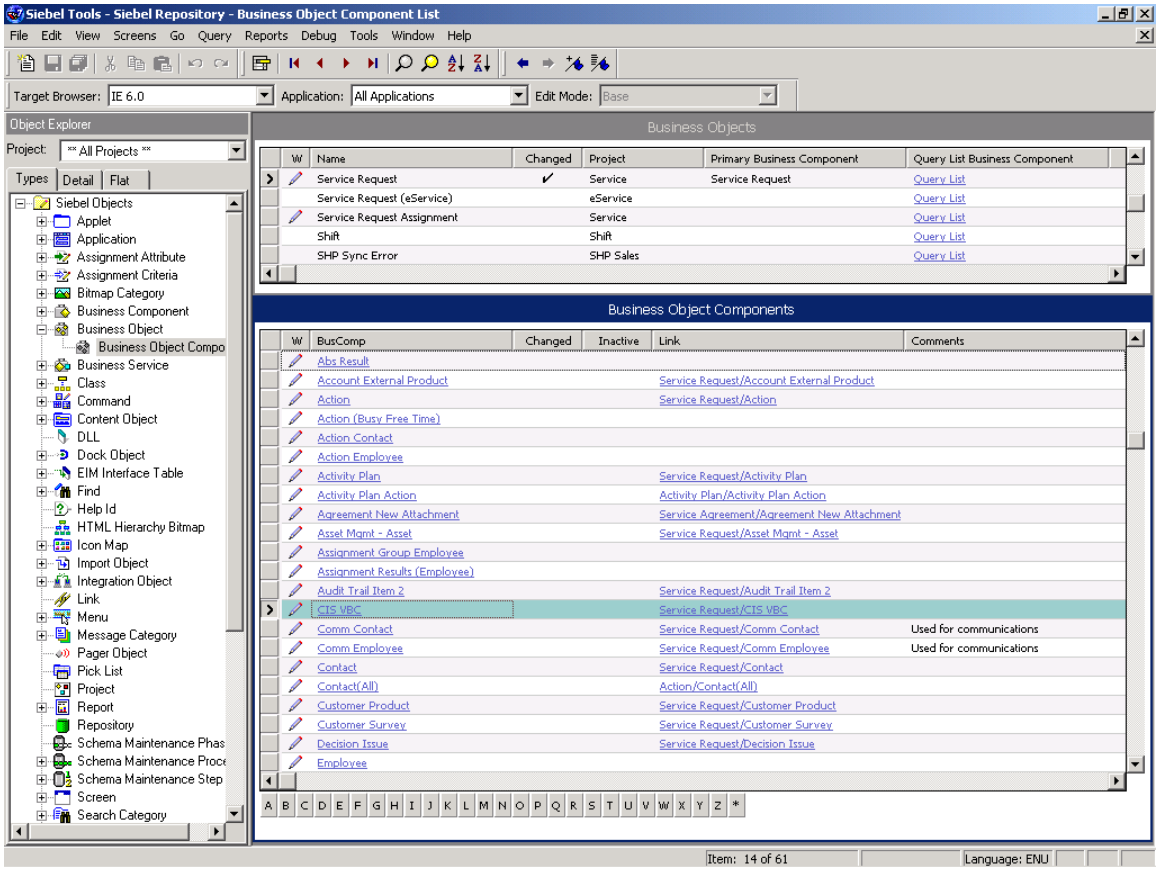
IV. Expand **Business Object** node and select **Business Object Component** object from object explorer window



V. Right click on Business Object Components panel and click on new record.



VI. For this record Set parameters BusComp = **CIS VBC** and Link = **Service Request/CIS VBC**

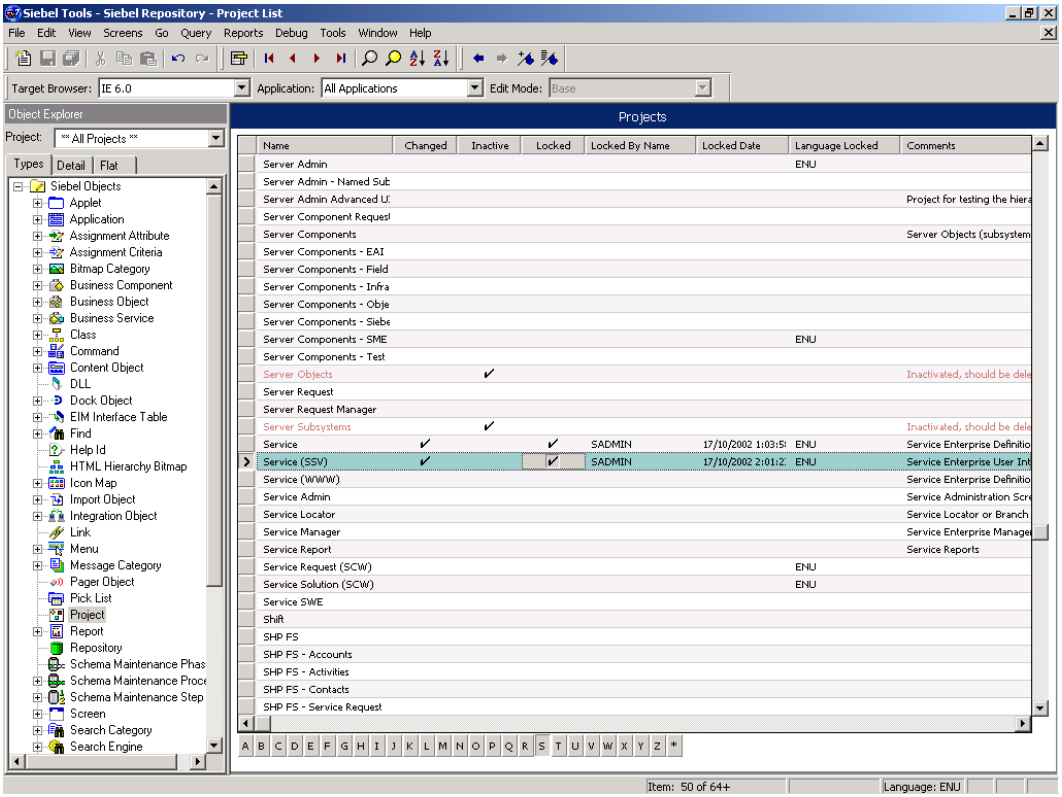


Adding CIS Views to Service Request Screen

I. From Object Explorer window, select object type **Project**

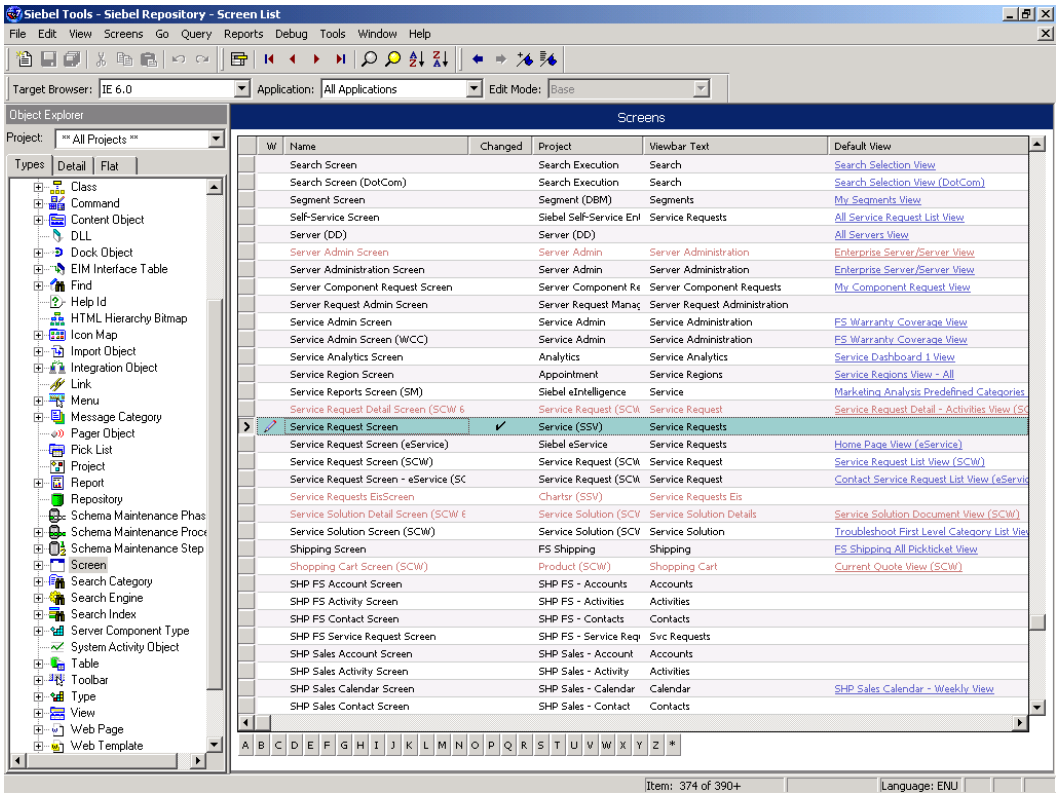
II. Select **Service (SSV)** project from Object List Editor window in the right pane.

III. Lock project **Service (SSV)**

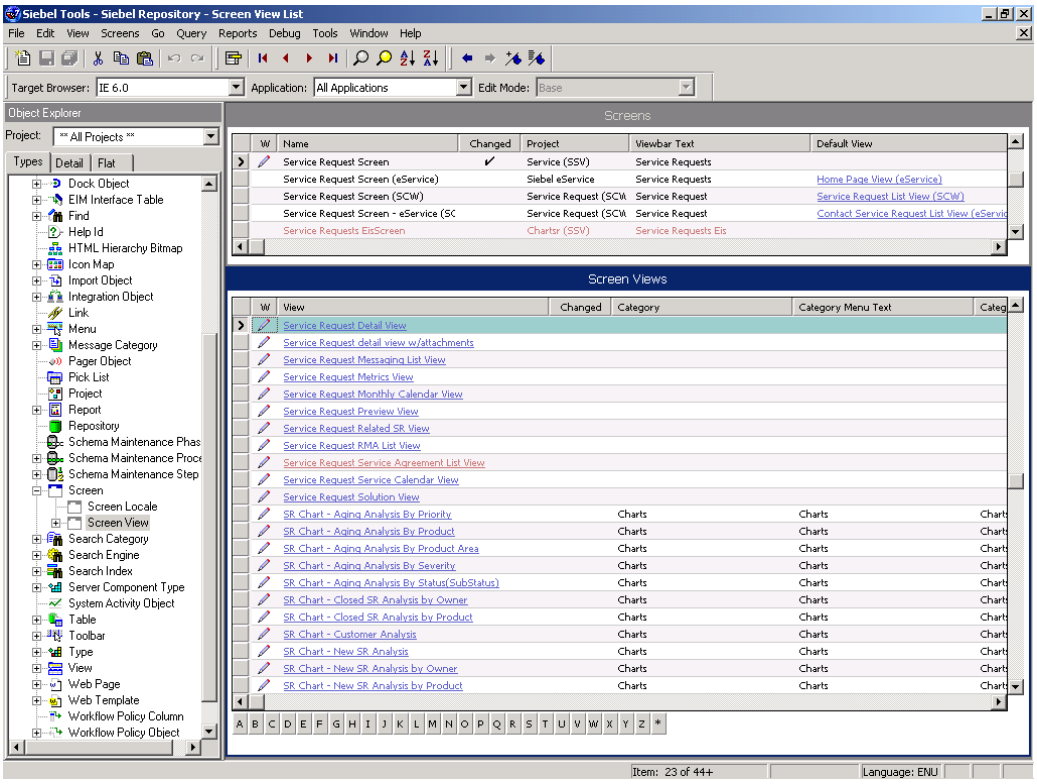


IV. From Object Explorer window, select object type **Screen**

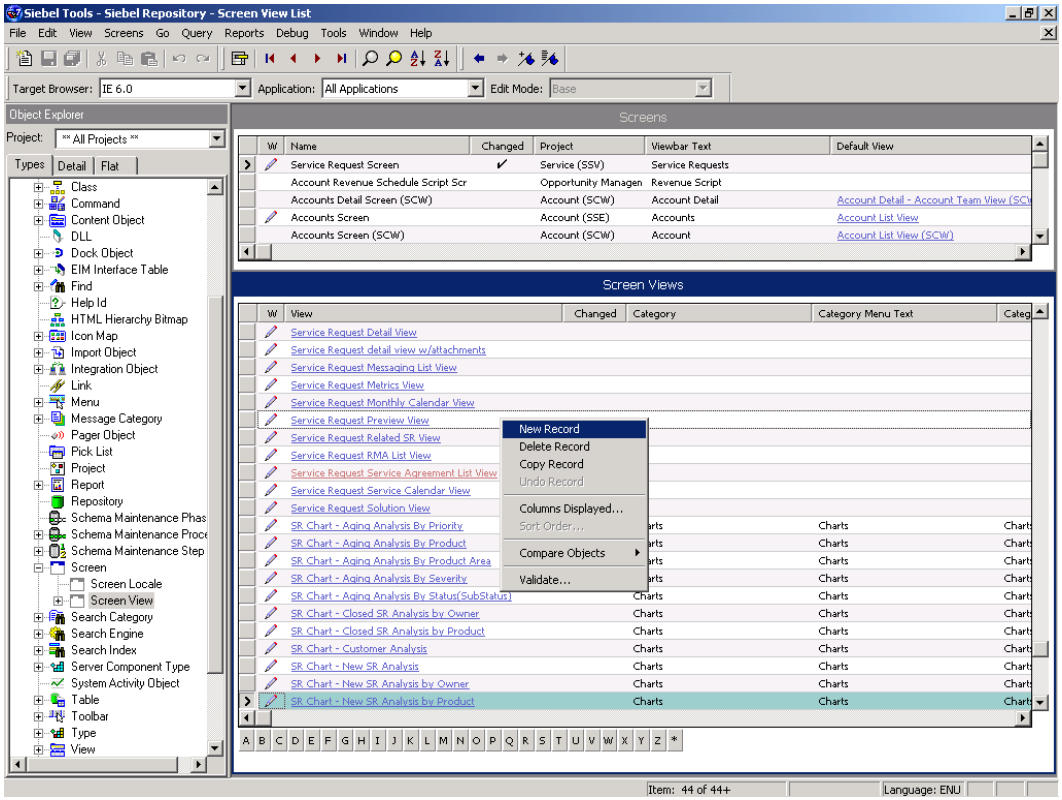
V. Select **Service Request Screen** screen from Object List Editor window in the right pane.



VI. Expand **Screen** node and select **Screen view** object from object explorer window



VII. Right click on **Screen View**s panel and click on new record.



VIII. Set properties of this new view object as follows

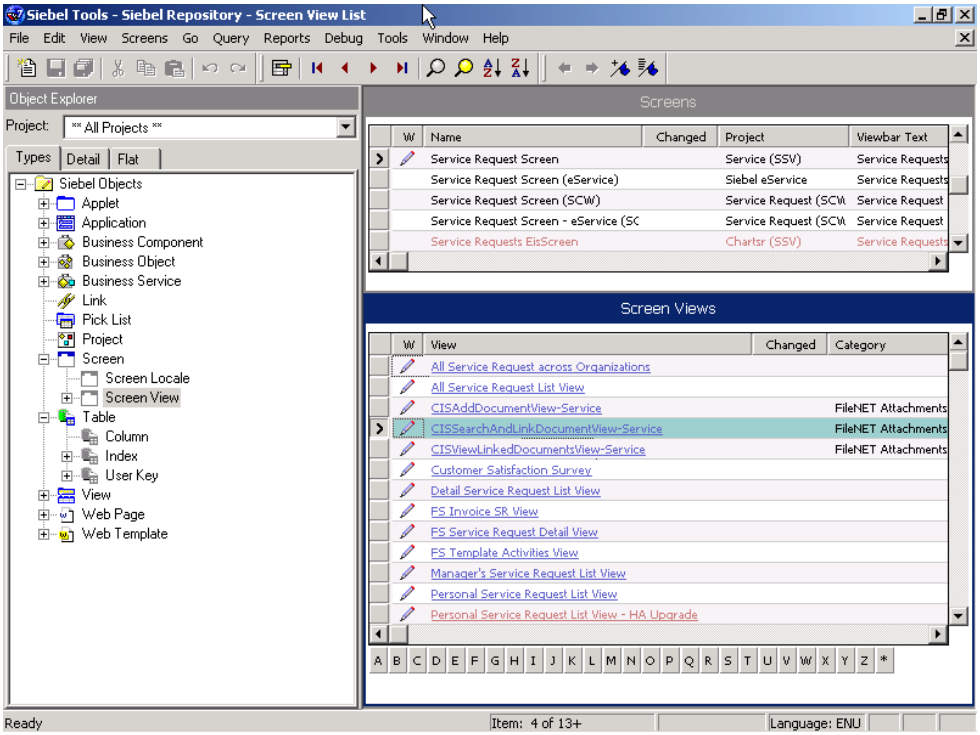
- Set ‘Category’, ‘Category menu Text’ & ‘Category View bar text’ properties of the view object as “FileNET attachments”
- Set ‘Sequence’ property to 20
- Set ‘Menu’ and ‘View bar text’ as “**View Linked Documents**”

IX. Create another view object and Set properties of this view object as follows

- Set ‘Category’, ‘Category menu Text’ & ‘Category View bar text’ properties of the view object as “FileNET attachments”
- Set ‘Sequence’ property to 30
- Set ‘Menu’ and ‘View bar text’ as “**Add Document**”

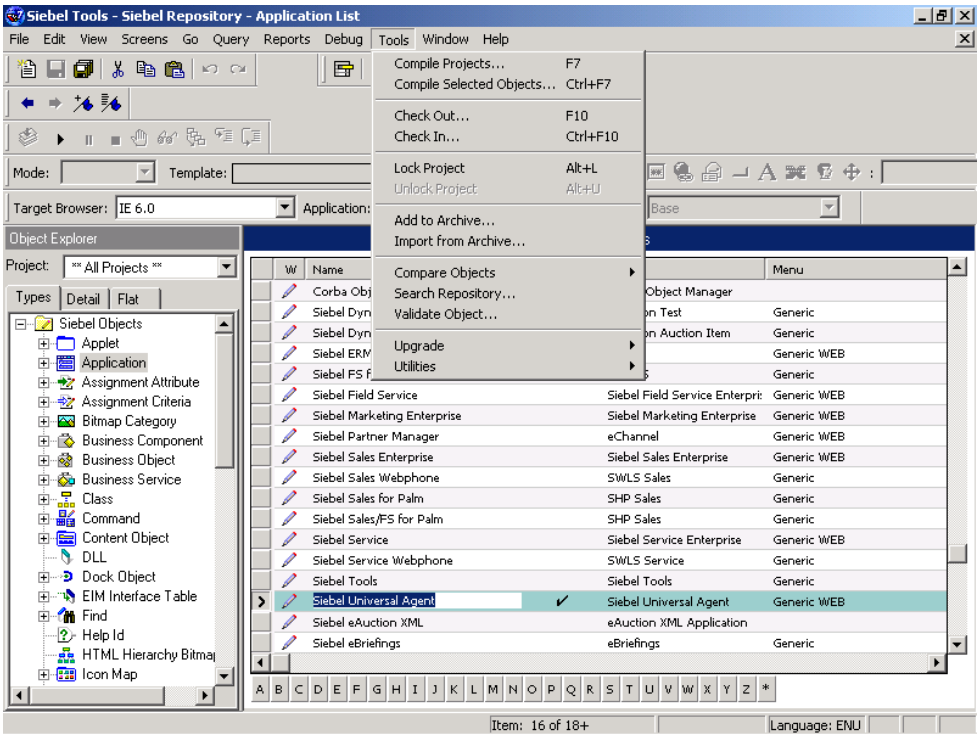
X. Create one more view object and Set properties of this view object as follows

- Set ‘Category’, ‘Category menu Text’ & ‘Category View bar text’ properties of the view object as “FileNET attachments”
- Set sequence property to 40
- Set ‘Menu’ and ‘View bar text’ as “**Query And Link Documents**”

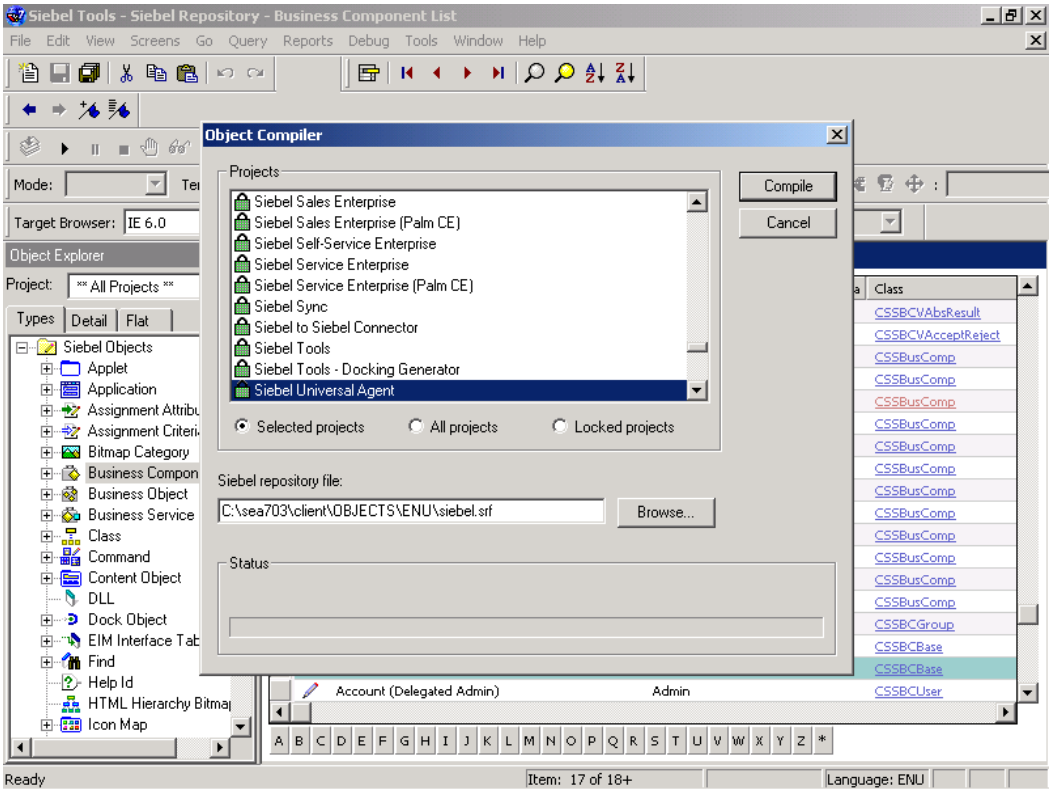


Compiling the repository

I. From Siebel Tools interface, navigate to Tools-> Compile projects



II. Select **Selected Projects** radio button. From the Projects list, select **CIS3.0Project, Siebel Universal Agent, Service (SSV) and Service**

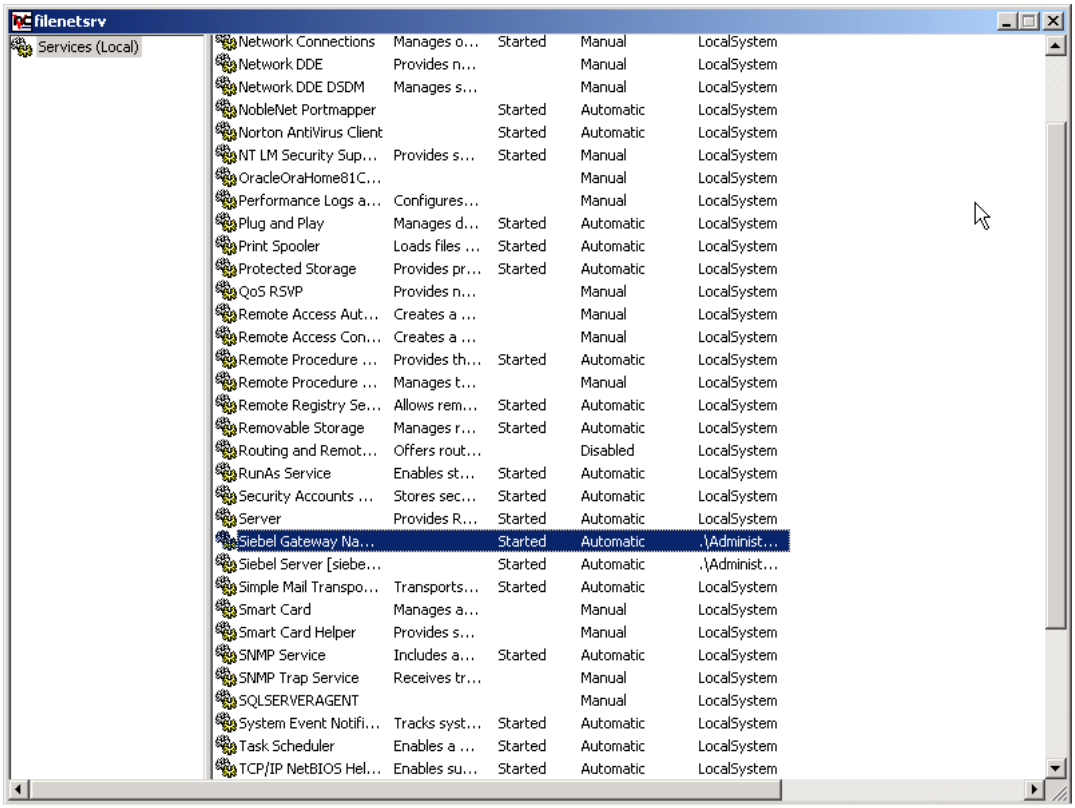


III. Click on **Compile** button.

IV. Close Siebel Tools application

V. From windows navigate to Settings ->Control Panel->Administration Tools -> services

VI. Stop Siebel services: **Siebel Gateway server** and **Siebel server**



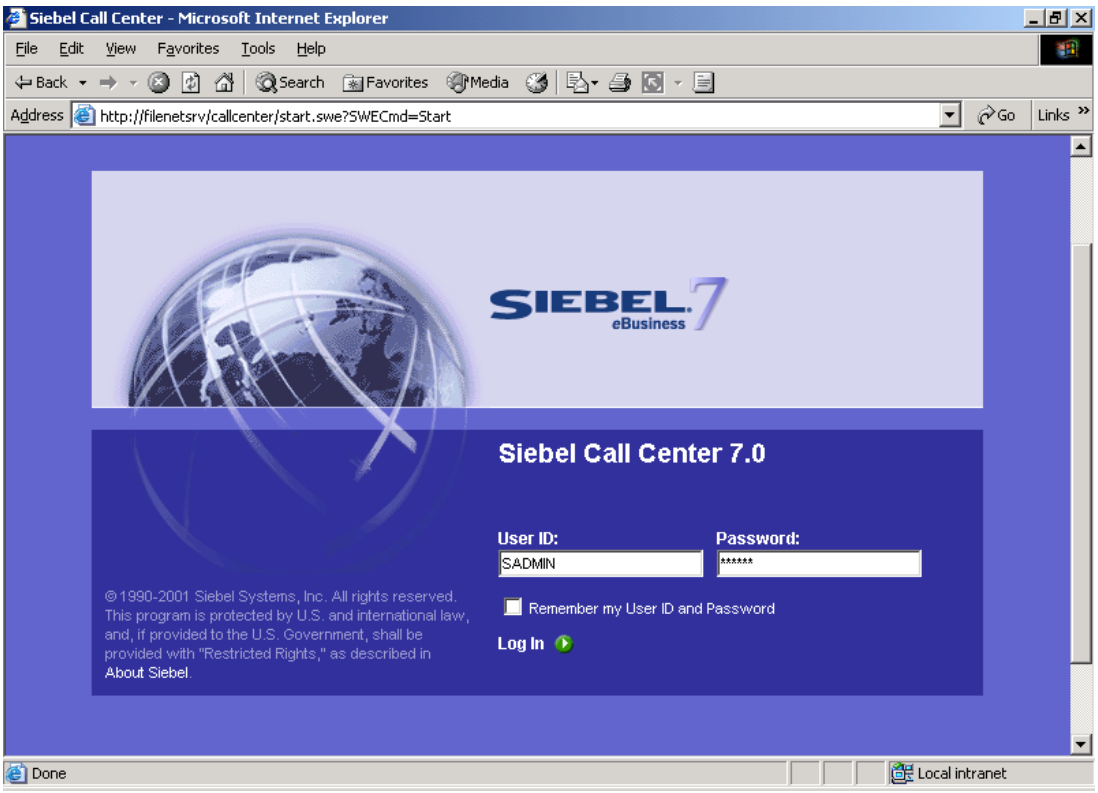
VII. Copy repository from the Siebel repository file location to sea703/siebsrvr/objects/enu. Siebel repository file location is **Siebel repository file** location selected at the time of compilation

Starting Siebel services

I. From Services start Siebel services: **Siebel Gateway server** and **Siebel server**

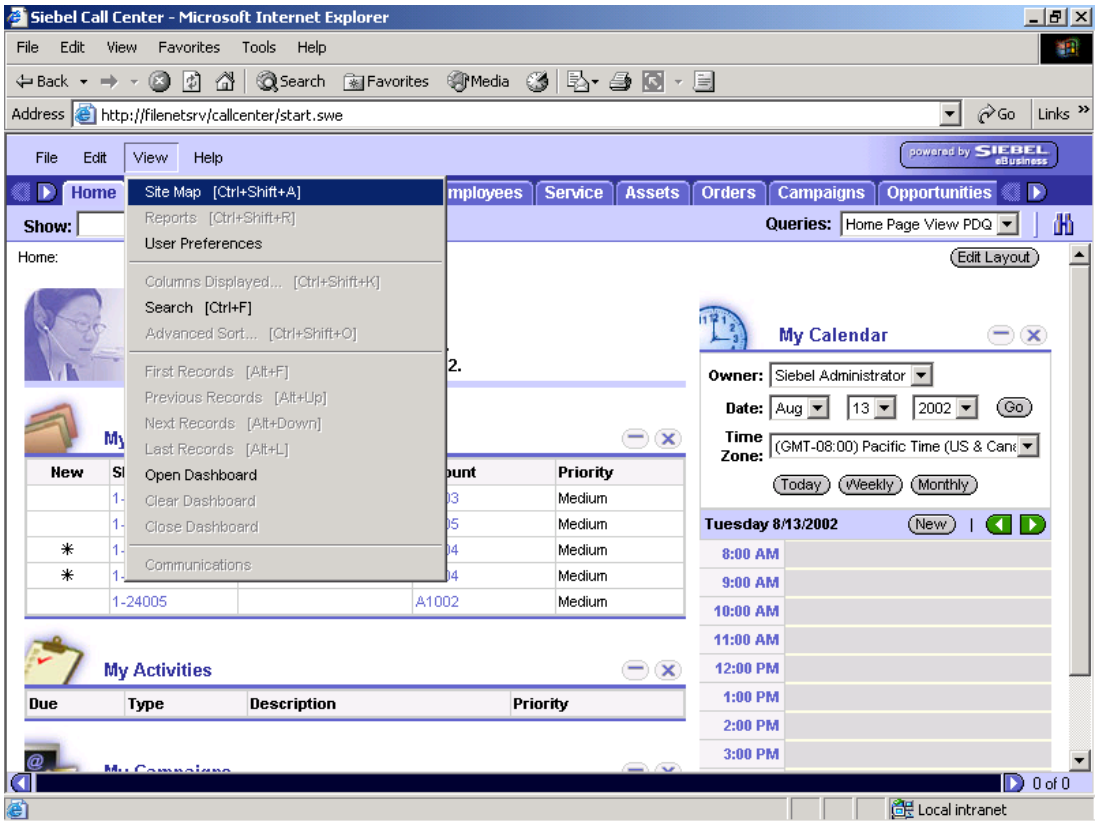
Enabling CIS Views

I. Run Call Center application by navigating http://servername>callcenter.

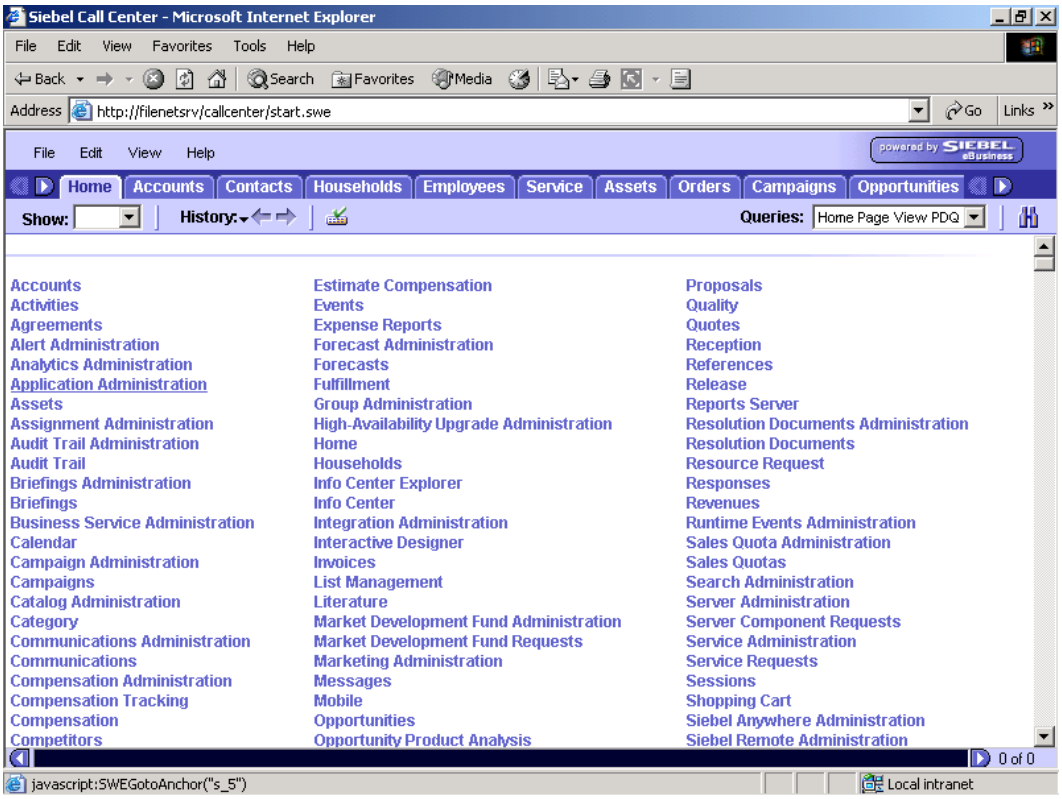


II. Login to Call Center with the valid login credentials

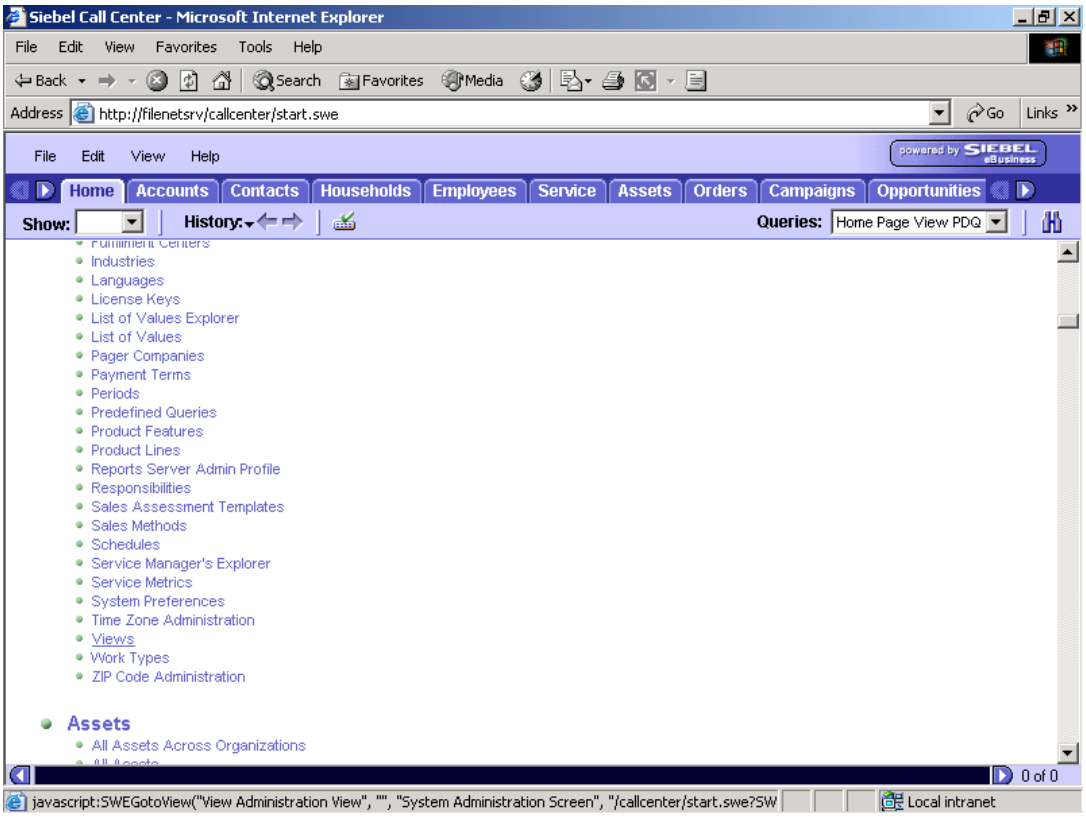
III. Navigate to View -> Site Map



IV. Click on **Application administration**



V. Click on **Views** screen under **Application administration**

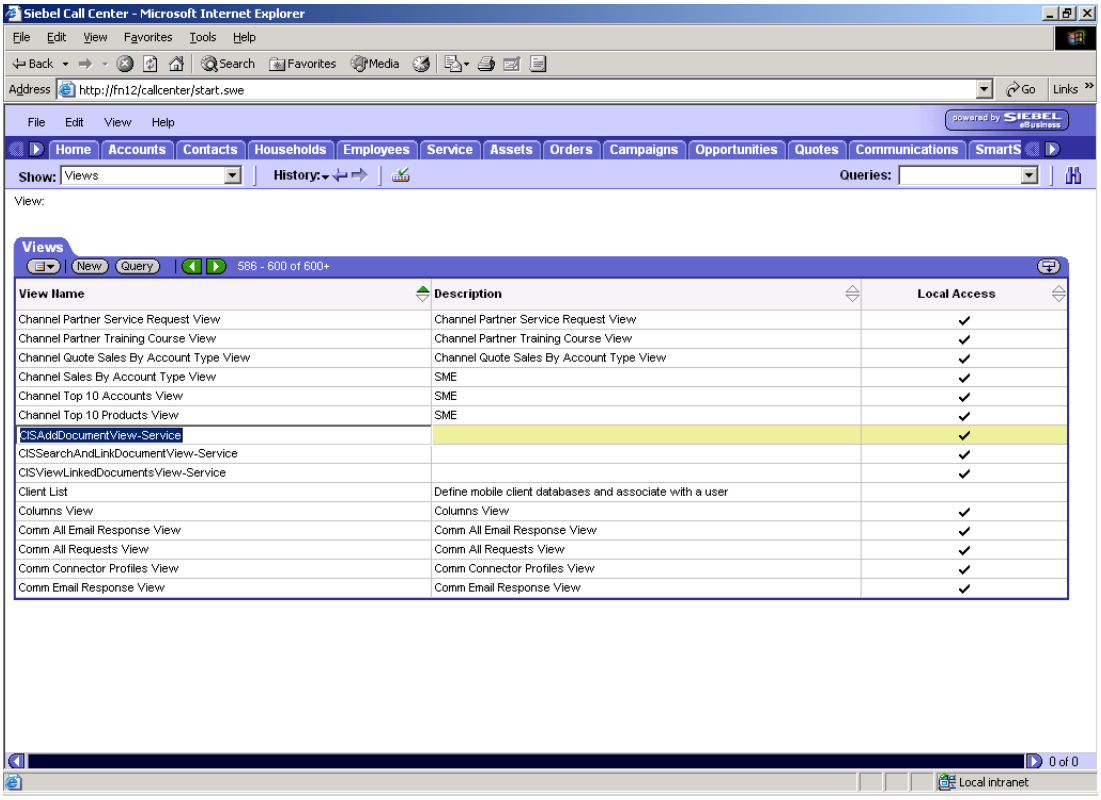


VI. Add entries for following CIS views by clicking on **New** Button

CISAddDocumentView-Service,

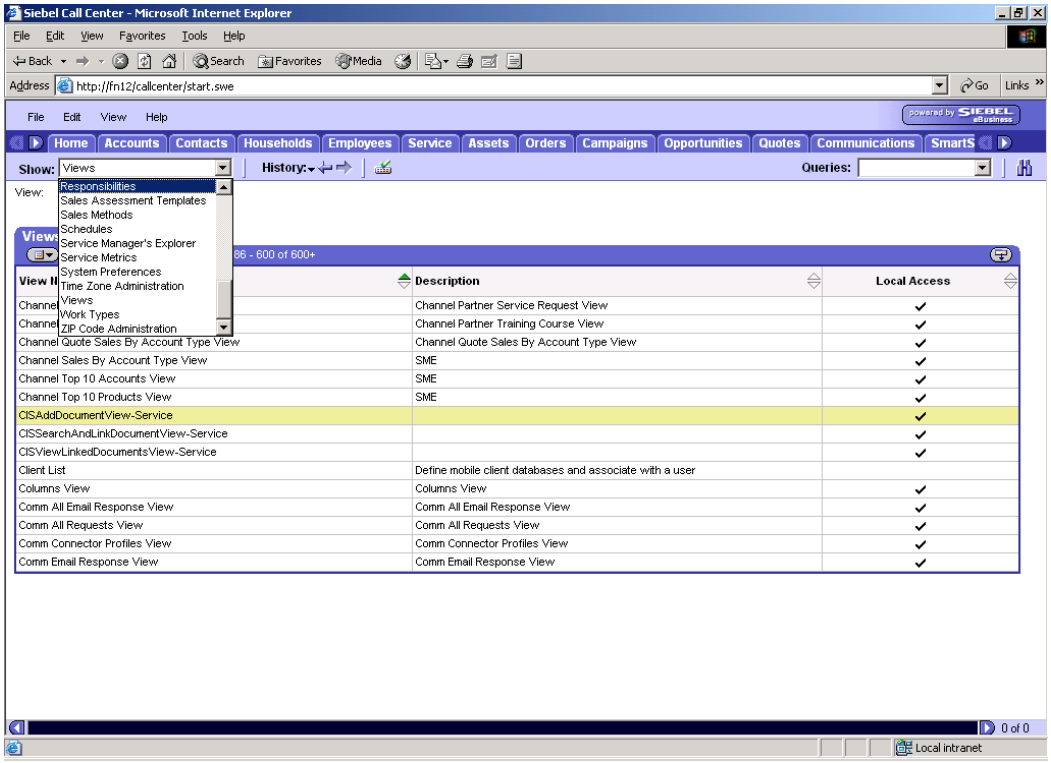
CISViewLinkedDocumentsView-Service

CISSearchAndLinkDocumentView-Service



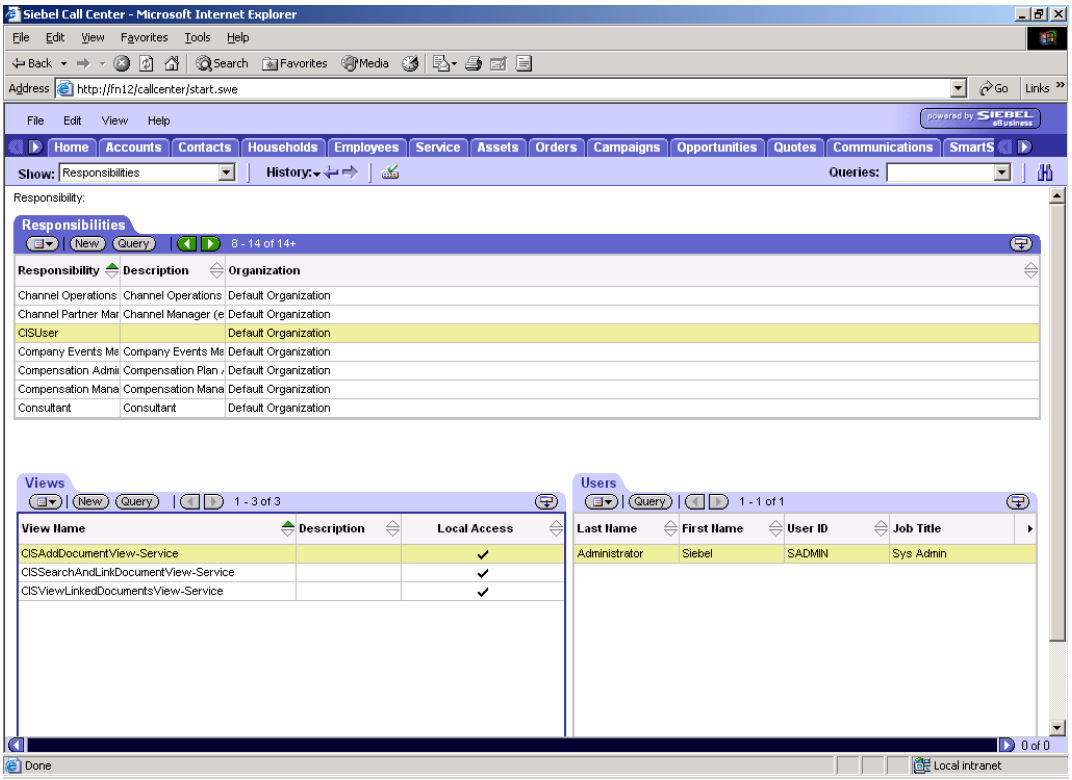
Assigning responsibility to the User

I. Select **Responsibility** from Show Drop Down



II. Create a record **CISUser** in responsibility view

III. Add CIS views in the view list and add user name in the user list who should get access to CIS views



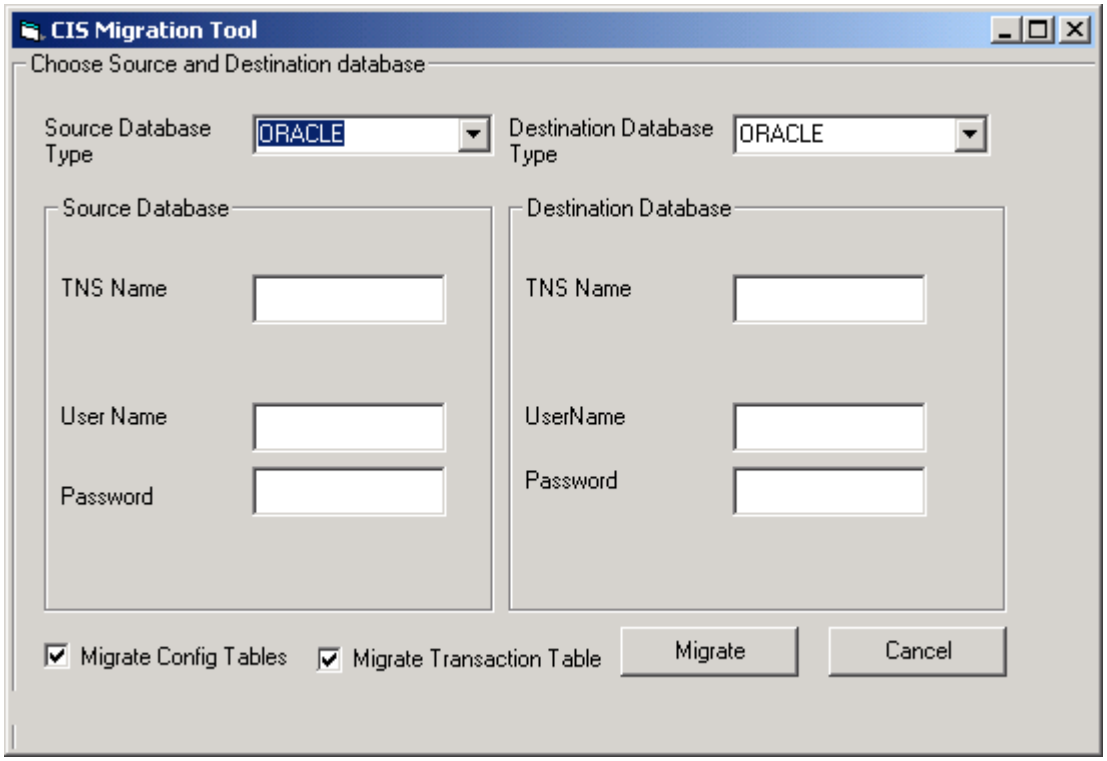
IV. Logout the call center application by navigating to File->Log Out

7
Data Migration

CIS Data migration Tool facilitates migration of data from CIS 2.1 database to CIS 3.0 database. Supported CIS 2.1 databases are MS Access, ORACLE and SQL Server whereas supported CIS 3.0 databases are ORACLE 8i and SQL server 2000.

Before running the data migration ensure that System Administrator has already created CIS 3.0 Database by running CIS 3.0 database creation script.

To run Migration Tool, from windows explorer navigate to Start->Programs-> CRM Integration Suite 3.0->migration Tool. Following screen will appear



Migration Tool interface consists of 2 panels, one for source database entries and the other one for destination database entries.

In order to migrate data from CIS 2.1 database to CIS 3.0 database, populate **Source Database** panel with CIS 2.1 database details and **Destination Database** panel with CIS 3.0 database details. Check **Migrate Config tables** check box to migrate CIS configuration data and

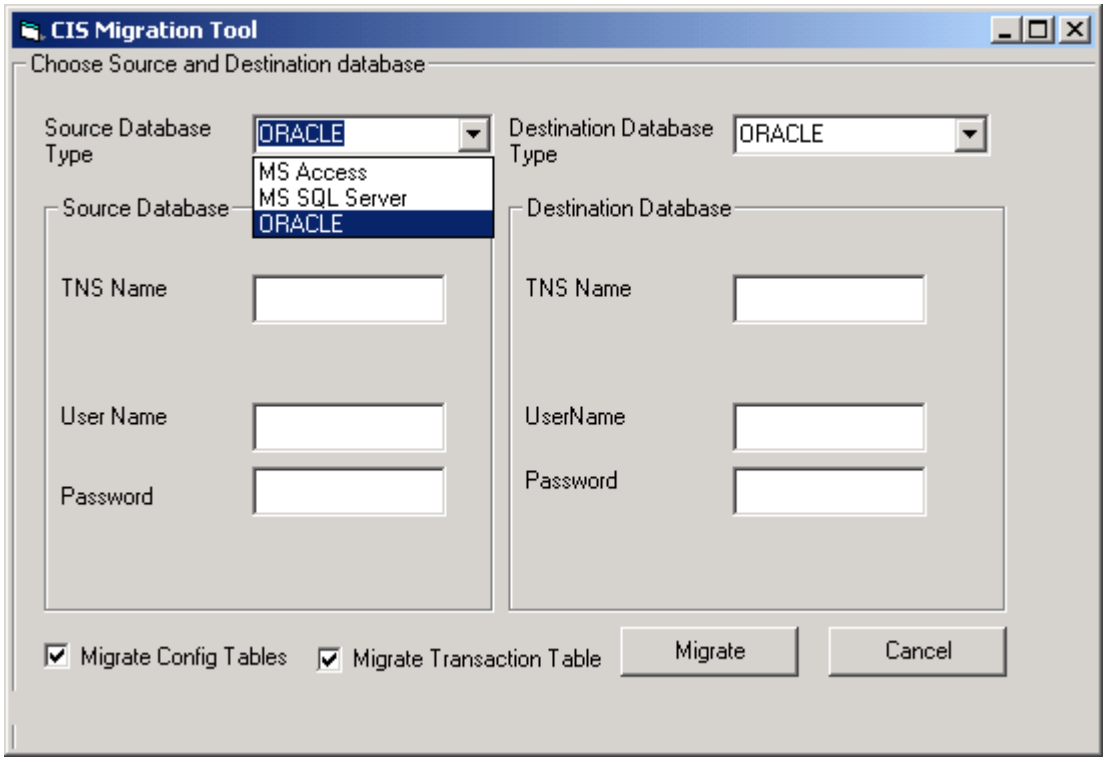
check **Migrate Transaction table** check box to migrate CIS transaction data.

Note Ensure that configuration data as well as Transaction data are successfully migrated before running CIS 3.0 application. If migration is planned in 2 steps, migrate configuration data before migrating transaction data.

Select source database type (CIS 2.1 database type) from **Source Database Type** drop down.

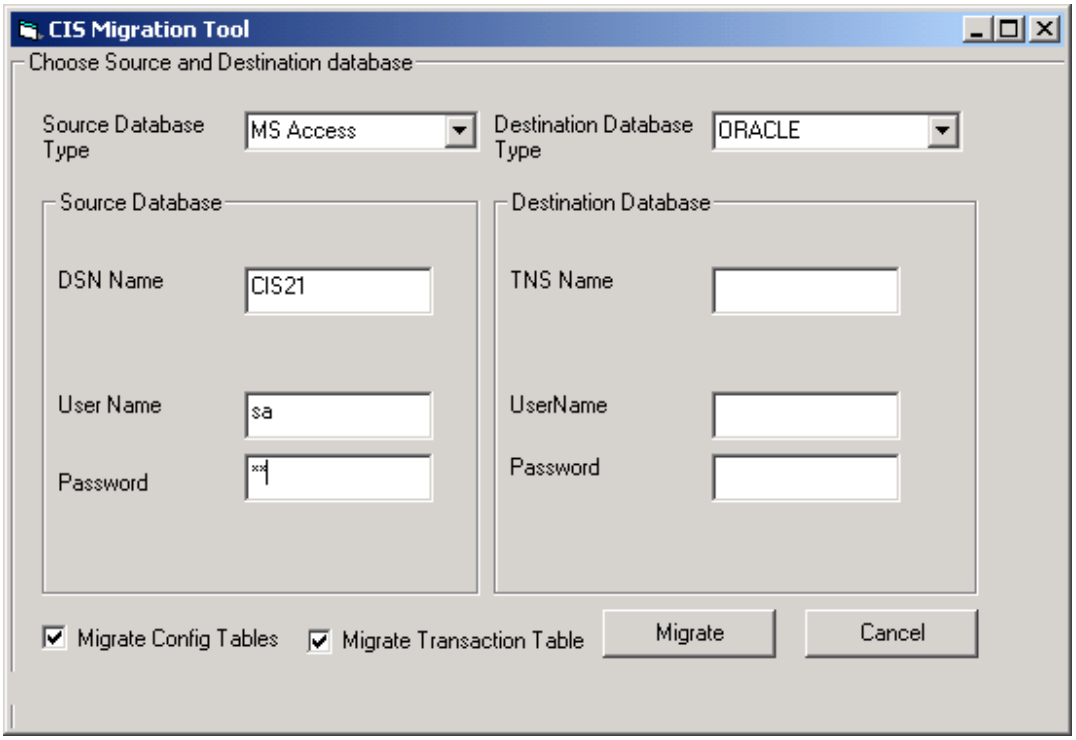
Selecting ORACLE as source Database

For source database type **ORACLE** provide **TNS name, User name and password**



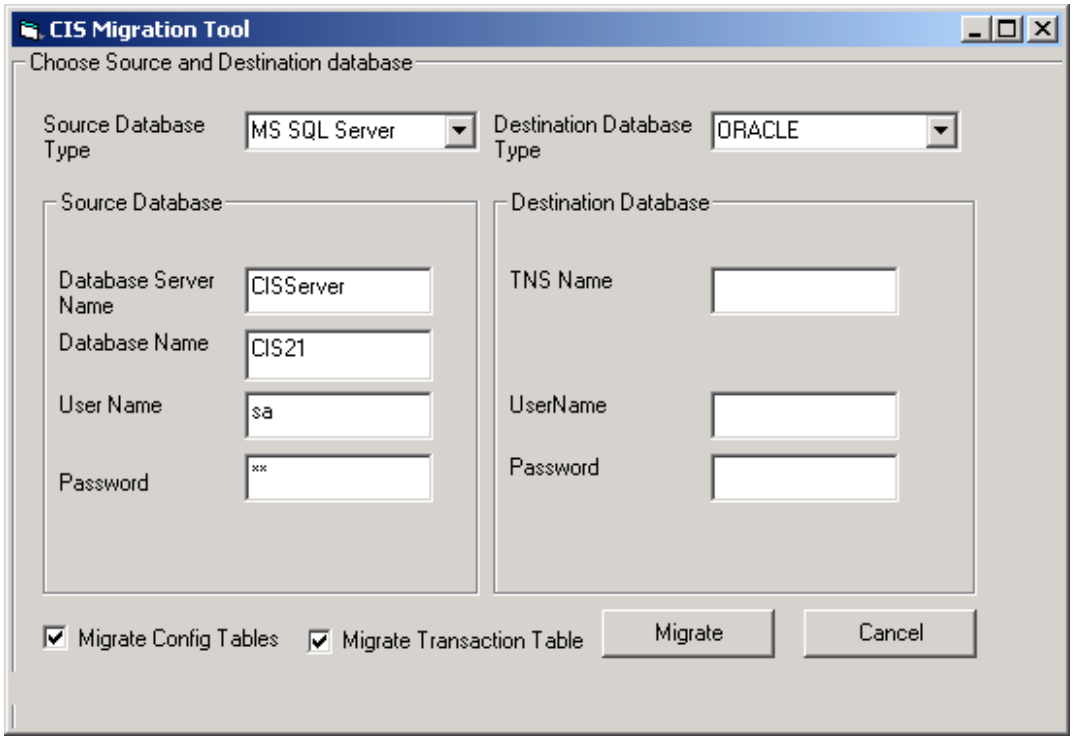
Selecting MS Access as source Database

For source database type **MS Access** provide **DSN name**, **User Name** and **Password**



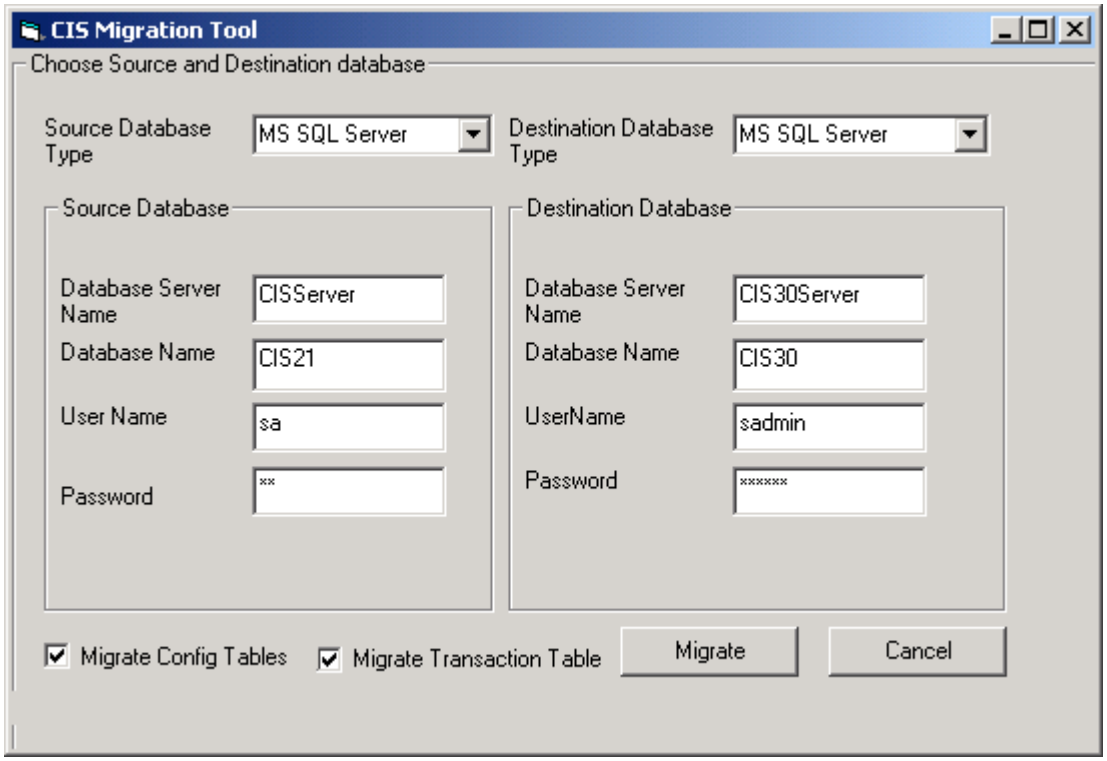
Selecting MS SQL Server as source Database

For source database type **MS SQL Server** provide **Database Server name**, **Database name**, **User name** and **Password**



Select destination database type (CIS 3.0 database type) from **Destination Database Type** drop down.

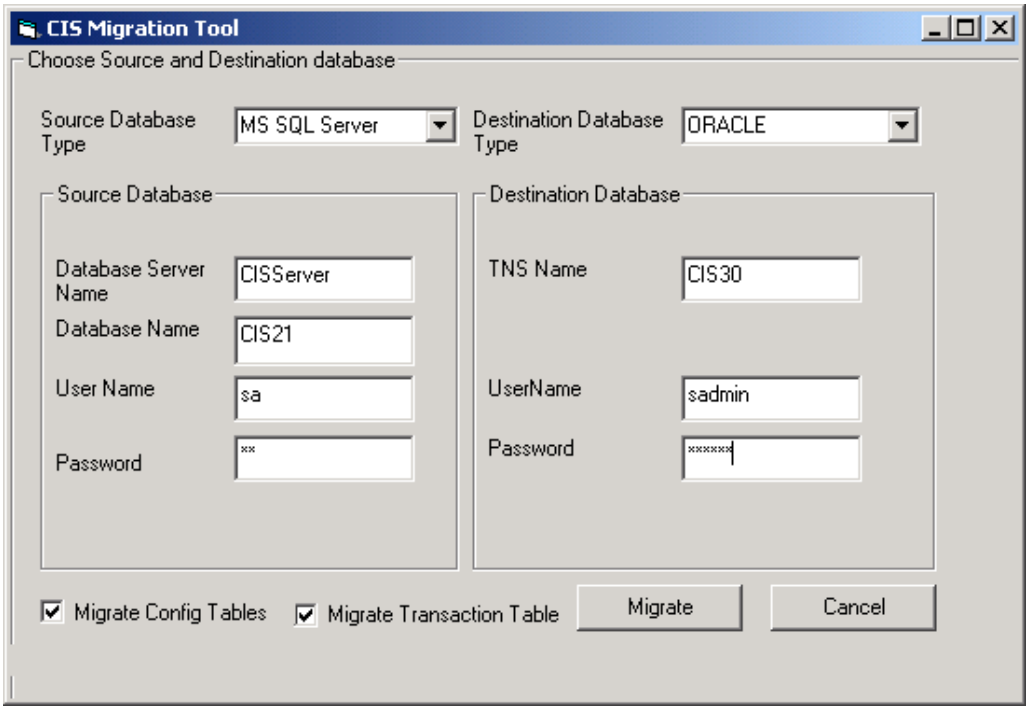
Selecting MS SQL Server as destination Database



For destination database type **MS SQL Server** provide **Database Server name**, **Database name**, **User name** and **Password**

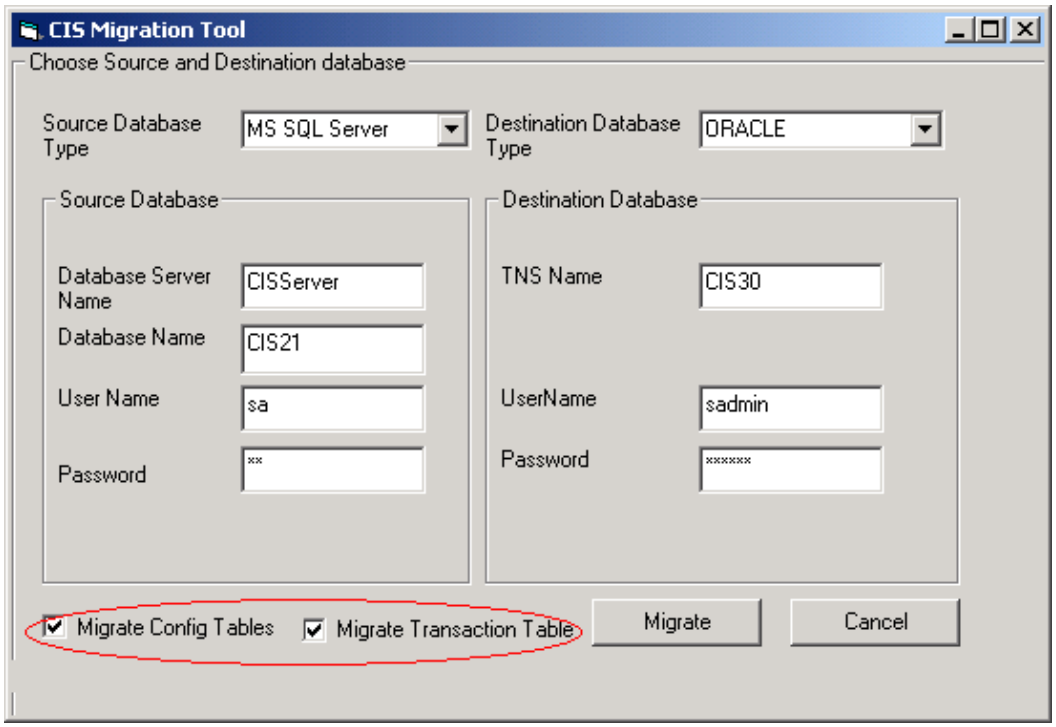
Selecting ORACLE as destination Database

For destination database type **ORACLE** provide **TNS name**, **User Id** and **password**



Selecting Tables to be migrated

Specify tables to be migrated by checking appropriate check box. Check **Migrate Config Tables** check box to migrate configuration data and check **Migrate transaction table** check box to migrate transaction data.



Transaction data must be migrated either along with the configuration data or after configuration data is migrated.

Note If rerunning migration process is required, perform it on a new CIS3.0 database. Rerunning migration process on the populated destination database will result in an error.

In order to migrate data, click on **Migrate** button. A task bar displaying migration status will appear at the bottom of the screen. If both the check boxes are checked configuration data will be migrated first followed by transaction data.

After both the migrations are done migration reports will be generated.

Migration Reports

At the end of the migration process following reports will be generated

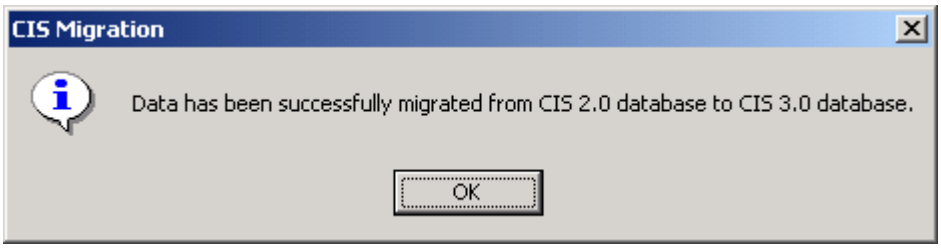
Migration Report – This report lists count of records for all Source tables and Destination tables.

Exception Report – This report lists all exceptions that occurred while migrating transaction data. Those transaction records that reside in the source database but could not got migrated to the destination database will be listed in this report.

Following conditions will result in exception for transaction table

- Document class is not configured
- Business component is not configured
- Document class and Business Component both are not configured

Once migration process is over, completion message will be displayed. Once user clicks on **Ok,** migration application will be closed.



If any error occurs while migrating configuration data from CIS 2.1 database to CIS 3.0 database, the whole transaction will be rolled back.

However, if an error occurs while migrating transaction data, the transaction will not be rolled back and application will resume migration process whenever transaction migration is rerun next time.

In order to unload Migration Tool, click on **Cancel** button

Appendix A - Single Sign On

CIS provides two modes of logon into FileNET libraries.

1. Single Sign On
2. Explicit logon

In case of explicit logon, CIS application prompts CIS user to provide valid FileNET credentials to perform operation on FileNET IS /CS libraries.

In case of 'Single Sign On' (SSO), application does not ask for any credential and uses FileNET credentials mapped to Siebel user for logon. To implement the mechanism FnLDAP.dll and a custom CISLDAP.dll have been used.

Note:	There is no specific configuration for 'Explicit logon'. If 'SSO Enabled' is false in CIS configuration that means FileNET logon mode for CIS is 'Explicit Logon'.

Appendix B – Software License Agreement

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