



Coveo Enterprise Search 6.5

Oracle Siebel Connector Guide

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1. Oracle Siebel Connector Features

The Coveo connector prototype for Oracle Siebel CRM systems is introduced with version 6.5 of the Coveo Enterprise Search (CES). The connector allows to index the content of sales applications from one or more Oracle Siebel CRM servers, integrating that content into the CES unified index, and making it easily searchable by users. Oracle Siebel is a system that provides a set of customer relationship management (CRM) applications.

Connector features

The features of the Oracle Siebel CRM connector are:

Content Indexing

The connector can retrieve and index the following default document types from the Oracle Siebel CRM sales application:

- Accounts
- Assets
- Contacts
- Opportunities
- Service Requests
- Attachments (requires the creation of a custom Web service on the Oracle Siebel server)

Security

The connector permissions in CES are based on the *Organizations* associated with each document in the Oracle Siebel CRM system. CES users will be able to search for any document that is from an Organization to which they belong.

Limitations

This prototype version of the connector does not support live indexing (but does include scheduled source refresh) and does not allow to index custom document types or documents types from other Oracle Siebel CRM applications.

What's Next?

- Review the connector requirements (see "[Oracle Siebel Connector Requirements](#)" on page 2).
- Review the deployment process (see "[Oracle Siebel Connector Deployment Overview](#)" on page 3).

2. Oracle Siebel Connector Requirements

Your environment needs to meet the following requirements to be able to use the Coveo connector for Oracle Siebel systems:

- CES 6.5

The connector prototype was introduced with CES 6.5 and is therefore not available in previous CES versions.

- CES Oracle Siebel Connector license

Your CES license must include support for the Oracle Siebel Connector to be able to use this connector.

- Oracle Siebel CRM version 8.1.1

The connector was developed and tested with Oracle Siebel CRM version 8.1.1.

- Matching Oracle Siebel and Windows Active Directory user IDs

Mapping of permissions requires User IDs defined in Siebel CRM to match user name entries in Windows Active Directory. When this is not the case, you can however manually map permissions (see ["Configuring and Indexing an Oracle Siebel Source" on page 18](#)).

What's Next?

Review the deployment process (see ["Oracle Siebel Connector Deployment Overview" on page 3](#)).

3. Oracle Siebel Connector Deployment Overview

The following procedure outlines the steps needed to deploy the Oracle Siebel connector. The steps indicate the order in which you must perform key configurations on the Oracle Siebel and CES systems. When needed, the step refers to a detailed procedure.

1. Validate that your environment meets the requirements (see ["Oracle Siebel Connector Requirements" on page 2](#)).
2. On the Oracle Siebel System:
 - a. Activate the Web services.

The CES connector uses UDS Web services that are inactive by default (see ["Activating Oracle Siebel Web Services" on page 5](#)).
 - b. Optionally enable support for attachment indexing.

The UDS Web services do not allow to index attachments. The Coveo connector needs a custom Web service to be able to index attachments (see ["Enabling Support for Attachments in an Oracle Siebel System" on page 5](#)).
3. In CES:
 - a. Configure the user identity.

The Coveo connector needs an account to connect to the Oracle Siebel system and access the entire content that you wish to index (see ["Configuring an Oracle Siebel User Identity" on page 13](#)).
 - b. Configure the security provider.

The Coveo connector needs to resolve mappings between users and groups (Organizations) from the Oracle Siebel system and Windows Active Directory (see ["Configuring an Oracle Siebel Security Provider" on page 14](#)).
 - c. Configure and index the Oracle Siebel source.

The Coveo connector needs to know details about the Oracle Siebel system to be able to index its content (see ["Configuring and Indexing an Oracle Siebel Source" on page 18](#)).

4. Oracle Siebel Configuration

This section contains procedures describing configuration to the Oracle Siebel CRM system version 8.1 that you need to perform to complete the deployment of the CES connector.

Refer to "[Oracle Siebel Connector Deployment Overview](#)" on page 3 to see when to use each procedure.

The available procedures are:

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4.3 Screen Captures for Creating a New Oracle Siebel Integration Object	8

4.1 Activating Oracle Siebel Web Services

The Coveo connector retrieves content from the Oracle Siebel CRM system using the native UI Data Sync (UDS) Web services (see the Oracle documentation [About UI Data Sync Services](#)).

By default, these Web services and their corresponding Business services are inactive. You must activate them before attempting to index the content from the Oracle Siebel repository.

1. Referring to the Oracle document [Activating Preconfigured Integration Objects and Business Services](#), activate each of the following Business services using Siebel Tools:
 - WC_Account_BS
 - WC_Asset_DB_BS
 - WC_Contacts_BS
 - WC_Opportunity_BS
 - WC_Service_Request_BS
2. Update the Siebel repository file (SRF) with the above Business services.
3. Referring to the Oracle document [Activating Preconfigured Web Services](#), activate the following Web services using the Siebel Web Client:
 - http://siebel.com/CustomUI/WC_Account_BS
 - http://siebel.com/CustomUI/WC_Asset_DB_BS
 - http://siebel.com/CustomUI/WC_Contacts_BS
 - http://siebel.com/CustomUI/WC_Opportunity_BS
 - http://siebel.com/CustomUI/WC_Service_Request_BS

What's Next?

Optionally, enable support for attachment indexing (see "[Enabling Support for Attachments in an Oracle Siebel System](#)" on page 5).

Otherwise, on the CES server, configure the user identity (see "[Configuring an Oracle Siebel User Identity](#)" on page 13).

4.2 Enabling Support for Attachments in an Oracle Siebel System

The UDS Web services allow the connector to index several Oracle Siebel document types. However, these Web services do not provide a way to retrieve attachments associated with these documents.

When you want to also be able to index the content of files attached to Oracle Siebel documents, you need to create a custom Web service exposes the attachments to the Coveo connector.

To deploy the custom Web Service on the Oracle Siebel server

1. Start Siebel Tools.
2. Create and lock a new project named *Coveo CES Integration*.
All objects created in the next steps must be created within this project.
3. Referring to the Oracle document [Creating Integration Objects Using the EAI Siebel Wizard Business Service](#), create the new Integration Objects listed in the following table. They will be used by the new Business service.

Note: See "[Screen Captures for Creating a New Oracle Siebel Integration Object](#)" on page 8 to view captures of key dialog boxes that complement the Oracle document [Creating Integration Objects Using the EAI Siebel Wizard Business Service](#).

Integration Object name	Source Object / Source Root	Integration components
CES_Account_IO	Account	Account Account Attachment
CES_Contact_IO	Contact	Contact Contact Attachment
CES_Opportunity_IO	Opportunity	Opportunity Opportunity Attachment
CES_Service_Request_IO	Service Request	Service Request Service Request Attachment

Note: The attachments for the Assets document types cannot be indexed with this connector.

4. Referring to the Oracle document [Creating Business Services in Siebel Tools](#), create the new Business service that will be called by the new custom Web service.
 - a. For Business service information, refer to the following table.

Business Service Name	Class	Display name - String override
Coveo CES Attachments Service	CSSEAIUIDataService	Coveo CES Attachments Service

- b. For Business service methods and arguments information, refer to the following table.

Business service method name	Display name - String override	Business service argument name	Data type	Type
GetAttachmentsInfo	GetAttachmentsInfo	AttachBCName	String	Input
		AttachBCSearchSpecField	String	Input
		AttachBCSearchSpecValue	String	Input
		ParentBOName	String	Input
		Return	String	Output
GetAttachment	GetAttachment	AttachBCSearchSpec	String	Input
		OutputIntObjectName	String	Input
		Return	String	Output

- Referring to the Oracle document [Writing Business Service Scripts](#), implement the new Business service methods using the following three Oracle Siebel eScript files available in the Siebel integration package in the `[CES_Install_Path]\Bin\Coveo.CES.CustomCrawlers.Siebel.zip` file.
 - Service_PreInvokeMethod.escript
 - GetAttachmentsInfo.escript
 - GetAttachment.escript
- Extract the attachment mapping file (Coveo.CES.CustomCrawlers.Siebel.config), from the `[CES_Install_Path]\Bin\Coveo.CES.CustomCrawlers.Siebel.zip` file to a location of your choice on the CES server.

Example: `C:\CES6\Siebel\Coveo.CES.CustomCrawlers.Siebel.config`

Note the extraction location as you will need it when defining the Oracle Siebel source parameters (see "[Configuring and Indexing an Oracle Siebel Source](#)" on page 18).

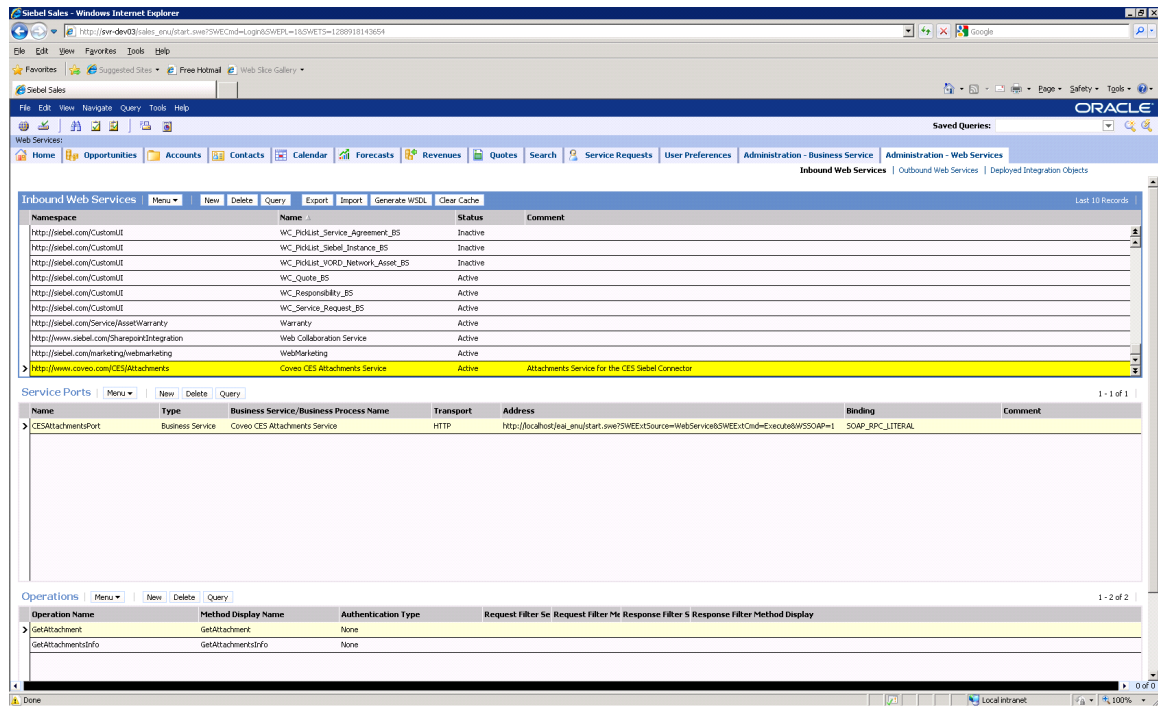
- Referring to the Oracle document [Publishing Inbound Web Services](#), create the new Inbound Web service using the information in the following tables.

Inbound Web service parameter	Value
Namespace	<code>http://www.coveo.com /CES/Attachments</code>
Name	<code>CoveoCESAttachmentsService</code>
Status	<code>Active</code>
Comments	<code>Attachments Service for the CES Siebel Connector</code>

Service ports parameter	Value
Name	<code>CESAttachmentsPort</code>
Type	<code>Business Service</code>
Business Service/Business Process Name	<code>Coveo CES Attachments Service</code>
Transport	<code>HTTP</code>
Binding	<code>SOAP_RPC_LITERAL</code>

Operation name	Method display name	Authentication type
GetAttachmentsInfo	GetAttachmentsInfo	None
GetAttachment	GetAttachment	None

The following figure illustrates what you should see in the Siebel Web Client once you are done creating a new Inbound Web service.



What's Next?

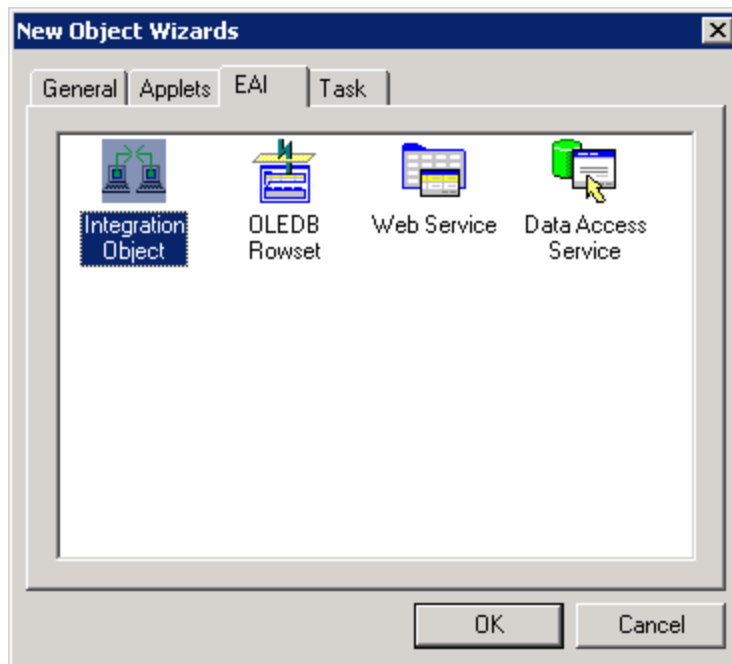
On the CES server, configure the user identity (see ["Configuring an Oracle Siebel User Identity"](#) on page 13).

4.3 Screen Captures for Creating a New Oracle Siebel Integration Object

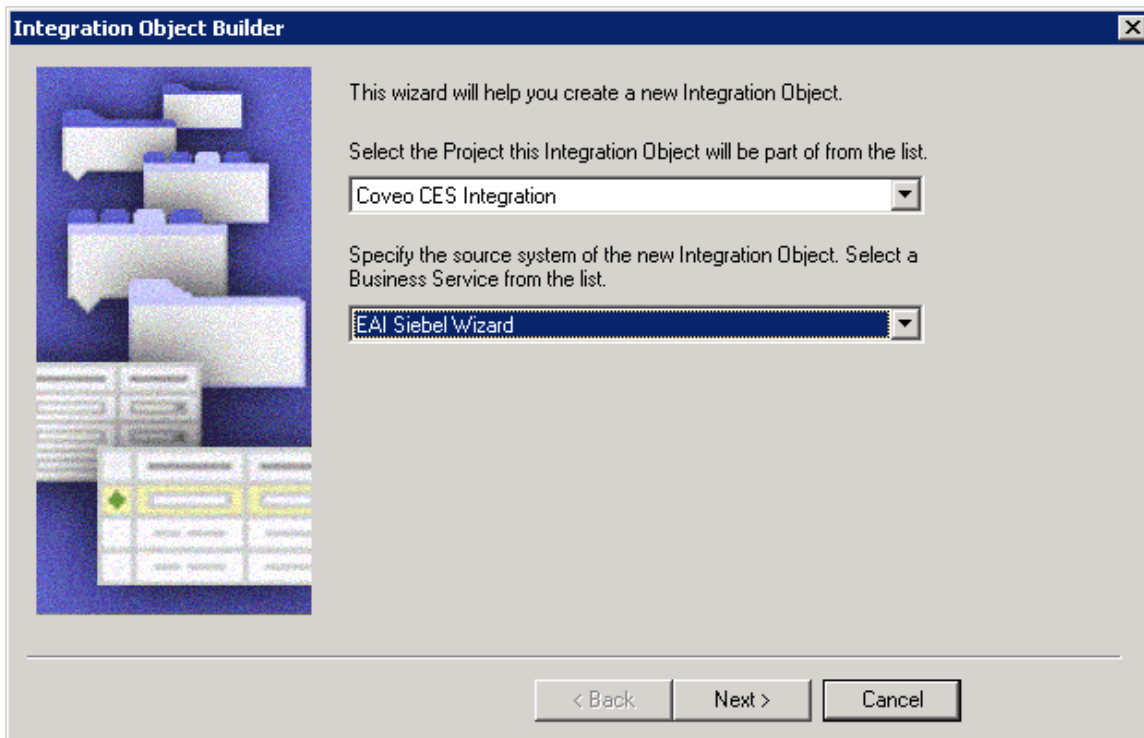
This topic presents screen captures to complement the Oracle document [Creating Integration Objects Using the EAI Siebel Wizard Business Service](#).

The following list presents the key dialog boxes for the listed actions performed in Siebel Tools when going through the process of creating a new Integration Object.

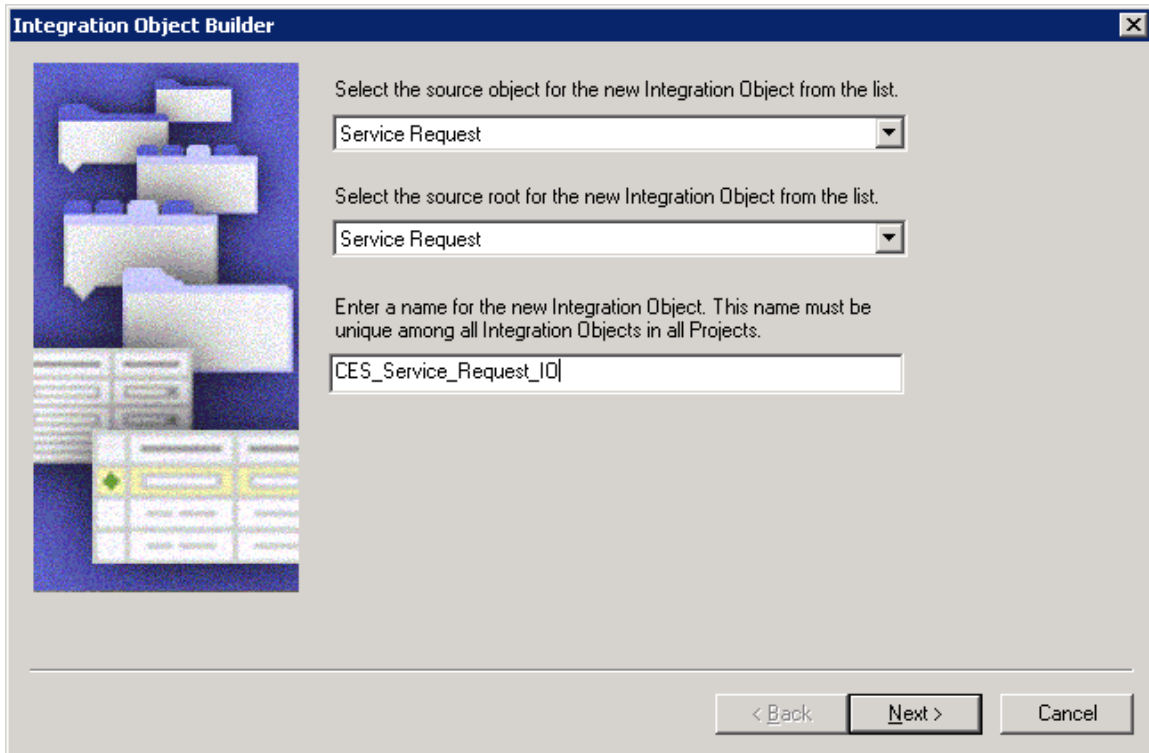
1. Launching the EAI (Enterprise Application Integration) **New Objects Wizards**.



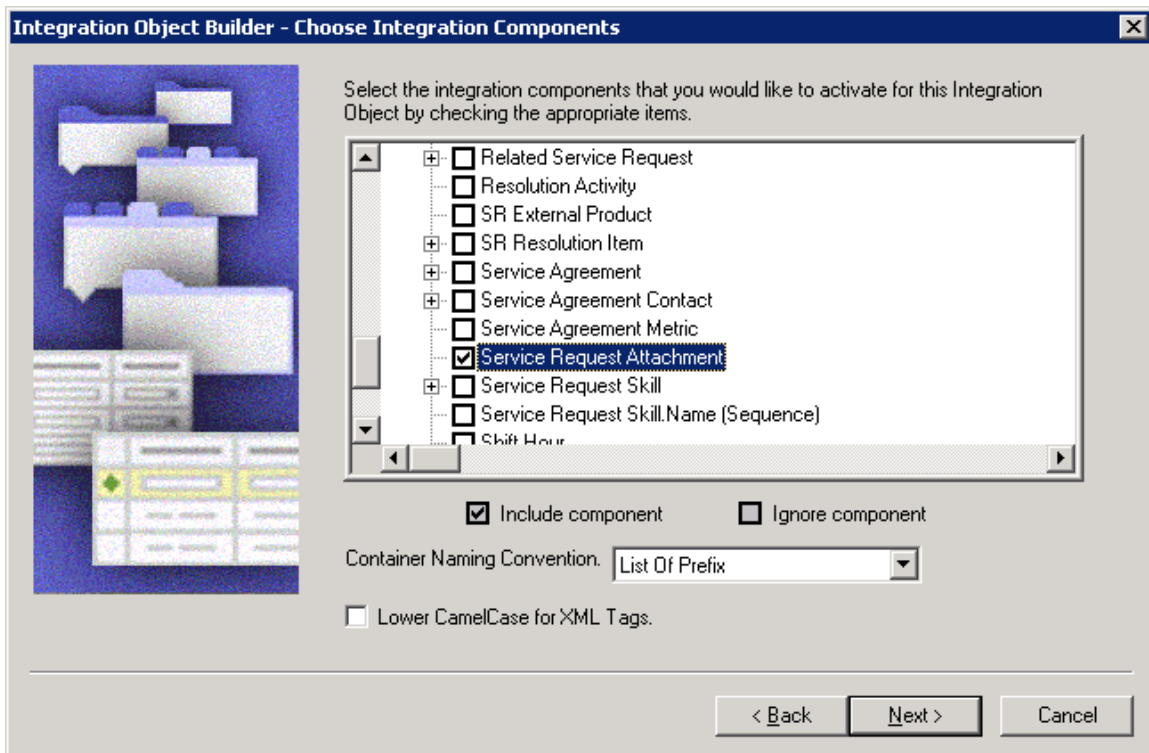
2. Selecting the destination project.



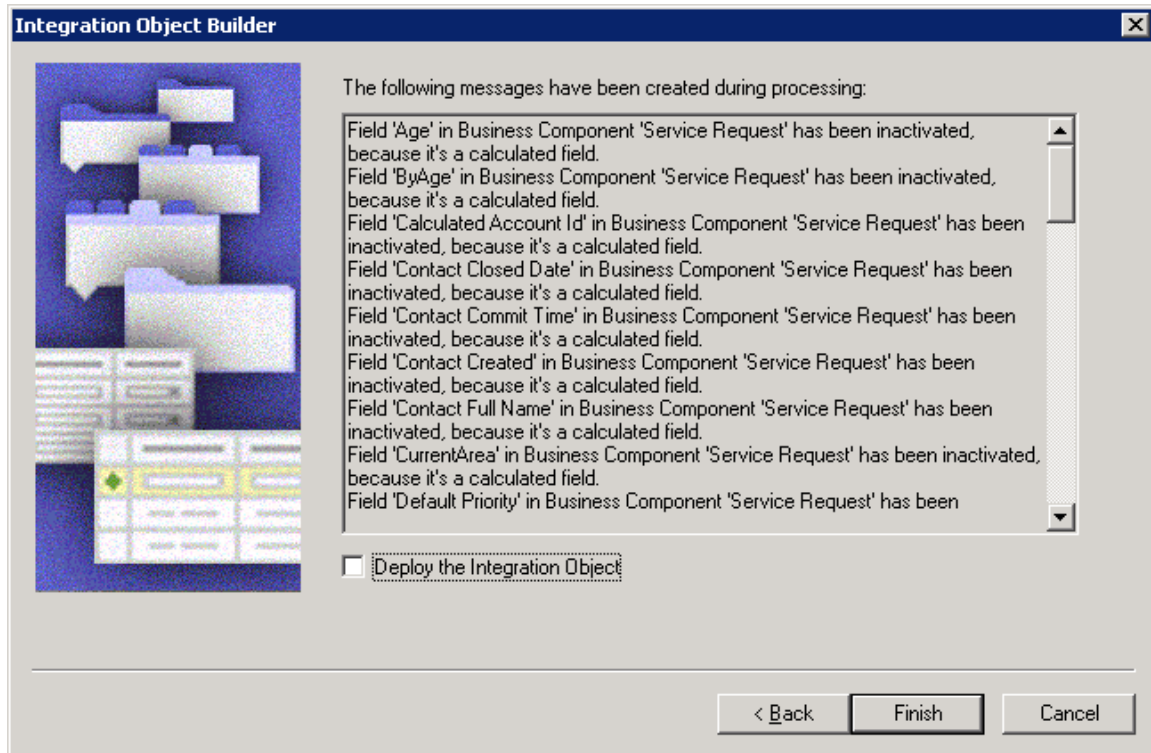
3. Selecting the Oracle Siebel source and root objects.



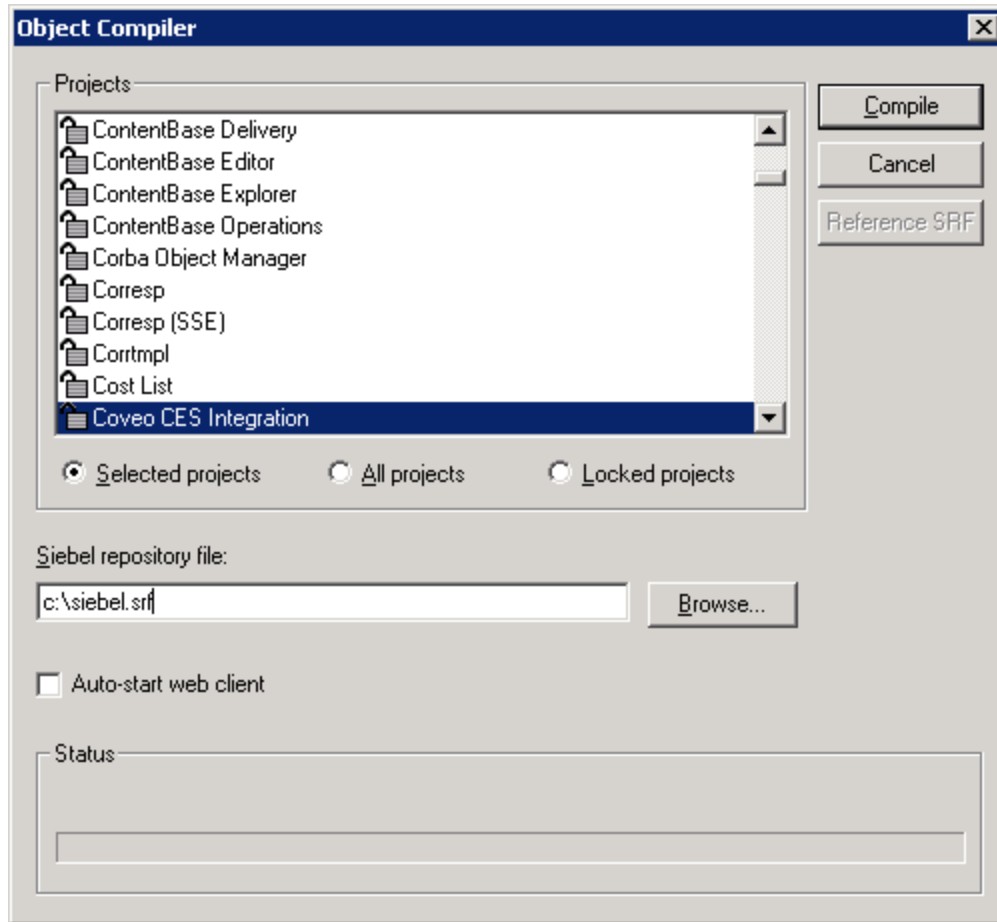
4. Selecting integration components.



5. Building the integration object.



6. Compiling the Siebel repository file (SRF).



5. CES Configuration for Oracle Siebel

This section contains procedures describing CES configuration that you need to perform to complete the deployment of the CES connector for an Oracle Siebel system.

Refer to "[Oracle Siebel Connector Deployment Overview](#)" on page 3 to see when to use each procedure.

The available procedures are:

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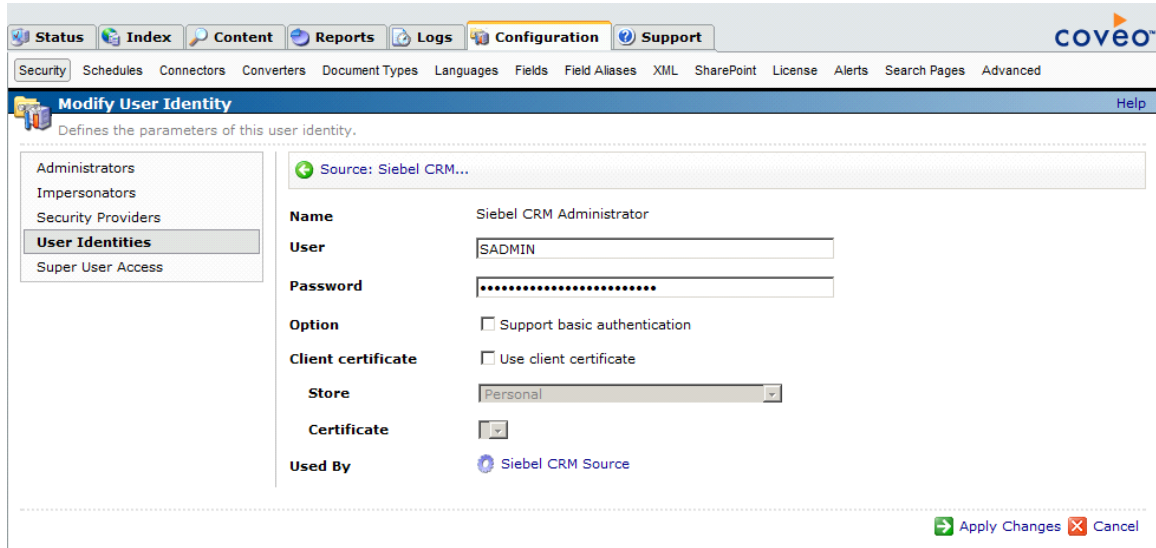
5.1 Configuring an Oracle Siebel User Identity

The Coveo connector requires an Oracle Siebel CRM account to authenticate itself with Oracle Siebel Web services. This account must have access to the entire Oracle Siebel repository when you want to index all available objects. Therefore, it is recommended, but not mandatory, that this account be the one of an administrator, such as *SADMIN*.

Note: You will use the user identity that you create with the following procedure when you define the security provider (see "[Configuring an Oracle Siebel Security Provider](#)" on page 14).

1. On the CES server, open the Administration Tool (Windows **Start** menu > **All Programs** > **Coveo Enterprise Search 6** > **Administration Tool**).
2. Select **Configuration** > **Security**.
3. In the **Security** page, in the left navigation pane, click **User Identities**.
4. In the **User Identities** page, click **Add**.
5. In the **Modify User Identity** page:
 - a. In the **Name**, **User**, and **Password** fields, enter the credentials of a Oracle Siebel CRM account that has access to the entire repository content that you want to index.

b. Click **Apply Changes**.



What's Next?

Configure the security provider (see ["Configuring an Oracle Siebel Security Provider" on page 14](#)).

5.2 Configuring an Oracle Siebel Security Provider

A security provider is required to resolve mappings between users and groups (Organizations) defined in the Oracle Siebel system and in Windows Active Directory.

Note: As specified in the requirements (see ["Oracle Siebel Connector Requirements" on page 2](#)), the User IDs from the Oracle Siebel system must match entries in Windows Active Directory. If this is not the case in your Oracle Siebel environment, do not perform the following procedure. Your alternative is to set permissions manually on the CES source (see [How to Modify Source Security Permissions](#)).

1. On the CES server, open the Administration Tool (Windows **Start** menu > **All Programs** > **Coveo Enterprise Search 6 > Administration Tool**).
2. Select **Configuration > Security**.
3. In the **Security** page, in the left navigation pane, click **Security Providers**.
4. In the **Security Providers** page, click **Add** to create a new security provider.
The **Modify Security Provider** page appears.

← Security - Security...

Name	<input type="text" value="Oracle Siebel CRM Security Provider"/>
DLL Path	<input type="text" value="C:\Program Files\Coveo Enterprise Search 6\Bin\Coveo.CES.CustomCrawlersSecurityProvider.dll"/>
User Identity	<input type="text" value="Oracle Siebel CRM Administrator"/> ? Add Edit Manage user identities
Parameters	<input type="text" value='AssemblyPath="C:\Program Files\Coveo Enterprise Search 6\Bin\Coveo.CES.CustomCrawlers.Siebel.dll";StartingAddress="http://srv-dev03/sales_enu/start.swe";CacheDirectoryPath="C:\temp"'/>
SAML Redirection URI	<input type="text"/>
SAML Artifact Resolver URI	<input type="text"/>
SAML Logout URI	<input type="text"/>
SAML Signature Certificate File Name	<input type="text"/>
SAML Signature Certificate Password	<input type="password"/>
SAML Artifact Argument Name	<input type="text" value="SAMLart"/>
SAML Post Response Argument Name	<input type="text" value="SAMLResponse"/>
SAML Back Target Argument Name	<input type="text" value="TARGET"/>
Authorization Cache Timeout	<input type="text" value="3600"/>
Authentication Cookie Expiration	<input type="text" value="1"/> ?
Option	<input type="checkbox"/> Do not block exceptions <input type="checkbox"/> Require authorization <input checked="" type="checkbox"/> Support access list <input checked="" type="checkbox"/> Support expand group <input checked="" type="checkbox"/> Support expand user <input type="checkbox"/> Run in 64 bits
Used By	No source uses this security provider.

[→ Apply Changes](#)

5. Configure the following required parameters:

Name

Choose a significant name to identify the security provider.

Example: Oracle Siebel Security Provider

DLL Path

Enter the following path:

[CES_Install_Path]\Bin\Coveo.CES.CustomCrawlersSecurityProvider.dll
 where you replace [CES_Install_Path] by the actual path where CES is installed on your server (by default: C:\Program Files\Coveo Enterprise Search 6).

User Identity

Select the Oracle Siebel user identity previously created (see ["Configuring an Oracle Siebel User Identity" on page 13](#)).

6. In the **Parameters** text box, specify custom configuration parameters, entering all parameters as a single string in the following format:

```
ParameterName1="ParameterValue1";ParameterName2="ParameterValue2"; etc
```

Example:

```
AssemblyPath="C:\Program Files\Coveo Enterprise Search
6\Bin\Coveo.CES.CustomCrawlers.Siebel.dll";StartingAddress="http://[siebel-
host]/sales_enu/start.swe";CacheDirectoryPath="C:\temp";
```

- a. Include the following required parameters:

AssemblyPath

Path to the security provider executable: [CES_Install_Path]\Bin\Coveo.CES.CustomCrawlers.Siebel.dll

where you replace [CES_Install_Path] by the actual path where CES is installed on your server (by default: C:\Program Files\Coveo Enterprise Search 6).

StartingAddress

Base address of the Oracle Siebel server. This should be the same address as the one specified when you configure the source for the connector (see ["Configuring and Indexing an Oracle Siebel Source" on page 18](#)).

Example: http://[siebel-host]/sales_enu/start.swe in which you replace [siebel-host] by the actual Siebel host name.

CacheDirectoryPath

Folder where the cache file containing the list of Oracle Siebel users is saved on the CES server to improve performances on large Siebel repositories.

Example: C:\temp

- b. Include the following optional parameter only when you want to change the default value:

CacheLifeSpan

Time interval (in minutes) between automatic user cache file refreshes. The default value is 1440 (24 hours).

Note: Oracle Siebel User security changes between the refreshes will not be available to CES.

- c. Include the following optional Lightweight Directory Access Protocol (LDAP) parameters when the Windows identity under which CES is running is not from the same Active Directory domain as the Oracle Siebel CRM users.

LDAPSearchRoot

LDAP root address under which the security provider attempts to find Oracle Siebel CRM users.

Example: LDAP://OU=SIEBEL,DC=CORP,DC=DOMAIN,DC=COM

LDAPUsername

Username of an Active Directory account to use to authenticate with LDAP. In the format: domain\username.

Example: MyOrganization\admin

LDAPPassword

Password of the Active Directory account to use with LDAP.

7. Leave all the Security Assertion Markup Language (SAML) parameters as is.
8. In the **Option** section:
 - a. You must select the following check boxes for the Oracle Siebel connector to work:

Support access list

To use early-binding security, select to instruct the connector to add an Access Control List (ACL) to each document when crawling the repository.

Support expand group

Select to instruct the connector to expand the repository group into a list of repository users.

Support expand users

Select to instruct the connector to convert the list of repository users into a list of Windows Active Directory users.

- b. You must clear the following check box for the Oracle Siebel connector to work:

Require authorization

To use late-binding security, select to instruct CES to retrieve document-level permissions at query time from the repository.

- c. Clear the **Do not block exceptions** check box unless instructed to select if by a Coveo support agent.

When selected, this option instructs the security provider to transmit errors to CES. In rare cases, this option can provide additional information that may help to diagnose security provider problems.
 - d. On a 64-bit CES server, select the **Run in 64 bits** check box to instruct CES to run the security provider in 64-bit mode and therefore take advantage of the 64-bit performance. Clear this option only for rare connectors (not the Oracle Siebel connector) for which the security provider must run in 32-bit mode. On a 32-bit server, this option is disabled.

9. Click **Save**.

What's Next?

Configure and index the Oracle Siebel source (see ["Configuring and Indexing an Oracle Siebel Source" on page 18](#)).

5.3 Configuring and Indexing an Oracle Siebel Source

A source defines a set of configuration parameters for a specific Oracle Siebel server.

Note: In an environment with more than one Oracle Siebel servers, you need to define one source for each Oracle Siebel CRM server that you wish to index.

1. On the CES server, open the Administration Tool (Windows **Start** menu > **All Programs** > **Coveo Enterprise Search 6** > **Administration Tool**).
2. Select **Index** > **Sources and Collections**.
3. In the **Sources** section, click **Add**.
4. In the **Add Source** page:
 - a. Enter the appropriate value for the following parameters:

Name

A descriptive name of your choice for the connector source.

Example: Corporate Oracle Siebel CRM

Source Type

The connector used by this source. In this case, select `Siebel CRM`.

Addresses

The root address of the Oracle Siebel CRM application. This should be the same address that you entered for the `StartingAddress` parameter in the security provider (see ["Configuring an Oracle Siebel Security Provider" on page 14](#)).

Example: `http://[siebel-host]/sales_enu/start.swe` where you replace `[siebel-host]` by the actual Oracle Siebel host name.

Mapping File

The full path of a valid attachment mapping file. You need to fill this parameter only when you choose to also index attachments (see ["Enabling Support for Attachments in an Oracle Siebel System" on page 5](#)).

Example: `C:\CES6\Siebel\Coveo.CES.CustomCrawlers.Siebel.config`

Refresh Schedule

Time interval at which the index is automatically refreshed to keep the index content up to date. By default, the **Every day** option instructs CES to refresh the source everyday at 12 AM.

Note: Because live indexing is not available for the Oracle Siebel prototype connector, ensure to select the **Every day** option, as this is the only mechanism that ensures that the index content is kept up to date.

Authentication

Select the Oracle Siebel CRM user identity that you created previously for this source (see ["Configuring an Oracle Siebel User Identity" on page 13](#)).

The screenshot shows the 'Collection: Siebel - Add Source' configuration page. The form is filled with the following values:

- Name:** Corporate Siebel CRM
- Source Type:** Siebel CRM
- Addresses:** http://siebel-host/sales_enu/start.swe
- Rating:** Normal
- Document Types:** Default
- Active Languages:** Default
- Fields:** Default Scheme
- Refresh Schedule:** Every day
- Mapping File:** C:\CES6\Siebel\Mapping.config
- Parameters:** Add Parameter
- Option:**
 - Index subfolders
 - Index the document's metadata
 - Document's addresses are case-sensitive
 - Generate a cached HTML version of indexed documents
 - Open results with cached version
- Authentication:** Siebel CRM Administrator

At the bottom right, there are three buttons: Save, Save and Start, and Cancel.

- b. Click **Save**.
5. In the navigation panel on the left, click **General**.
6. In the **General** page, modify the **Title Selection Sequence** so that the **Use the filename** option is the first option at the top of the list.
7. In the navigation panel on the left, click **Permissions**.
8. In the **Permissions** page:
 - a. From the **Permissions** options:
 - select **Use a Security Provider**, and then choose from the drop-down menu the security provider that you created for this source (see ["Configuring an Oracle Siebel Security Provider" on page 14](#)).

OR

- i. Select the **Specify the security permissions to index** option when the user IDs in your Oracle Siebel CRM system do not match those in Windows Active Directory to manually specify the permissions that will be set on documents from this source.
 - ii. In the **Allowed Users** and **Denied Users** boxes, respectively enter the allowed and denied users and groups for the source.
- b. Click **Apply Changes**.
9. When you are ready to start indexing the Oracle Siebel source, click **Start**.
10. In the navigation panel on the left, click **Status**, and then validate that the indexing proceeds without errors.

5.4 About the Attachment Mapping File for an Oracle Siebel System

A mapping file is an XML formatted text file used by CES to map a type of document indexed by the Oracle Siebel connector to its binary attachments.

The attachment mapping file is only required when you choose to also index Oracle Siebel document attachments (see ["Enabling Support for Attachments in an Oracle Siebel System" on page 5](#)).

In the attachment mapping file, a `Mapping` entry associates a type of document with a type of Oracle Siebel Integration Object, which contains the attachment binary data for the type of document. With such a mapping defined, the connector is able to retrieve and index document attachments from Oracle Siebel, making those fully searchable through CES search.

The mapping file (Coveo.CES.CustomCrawlers.Siebel.config) for all types of documents supported by the Siebel CRM connector is available in the CES installation folder in `[CES_Install_Path]\Bin\Coveo.CES.CustomCrawlers.Siebel.zip`. You need to extract the mapping file from the ZIP file, save it in a location of your choice on the CES server (see ["Enabling Support for Attachments in an Oracle Siebel System" on page 5](#)), and add a link to it in the Oracle Siebel source (see ["Configuring and Indexing an Oracle Siebel Source" on page 18](#)).

The following sample attachment mapping file contains the mapping tags for the `Account` document type.

```

<?xml version="1.0" encoding="utf-8" ?>
<Siebel>
  <Mapping type="Account">
    <IndexAttachments Enabled="True">
      <IntegrationObjectName>
        CES_Account_IO
      </IntegrationObjectName>
      <AttachmentIntegrationComponentName>
        Account Attachment
      </AttachmentIntegrationComponentName>
      <AttachmentParentIntegrationComponentName>
        Account
      </AttachmentParentIntegrationComponentName>
      <AttachmentIntegrationComponentParentIdFieldName>
        Account Id
      </AttachmentIntegrationComponentParentIdFieldName>
      <AttachmentIntegrationComponentDataFieldXMLTag>
        AcctntFileBuffer
      </AttachmentIntegrationComponentDataFieldXMLTag>
    </IndexAttachments>
  </Mapping>
  <Mapping type="Contact">
    ...
  </Mapping>
</Siebel>
  
```

The following list provides a description for each of the XML nodes in the previous sample attachment mapping file.

Mapping type="Account"

Indicates for which document type supported by the Oracle Siebel connector the Mapping entry is for. Supported values are:

- Account
- Contact
- Opportunity
- ServiceRequest

Note: The attachments for the Assets document types cannot be indexed with this connector.

IndexAttachments Enabled="True"

Enables or disables indexing of attachments for this document type.

IntegrationObjectName

Name of the Siebel Integration Object used to retrieve attachments for the document type.

AttachmentIntegrationComponentName

Name of the Siebel Integration Component associated with attachments for the document type.

AttachmentParentIntegrationComponentName

Name of the Siebel Parent Integration Component associated with attachments for the document type.

AttachmentIntegrationComponentParentIdFieldName

Name of the Integration Component Field referencing the parent Integration Component Id.

AttachmentIntegrationComponentDataFieldXMLTag

XML Tag of the Integration Component Field containing the attachment data.

In Siebel Tools, locate the Integration Component Field of type DTYPE_ATTACHMENT and use the value from the “XML Tag” column.