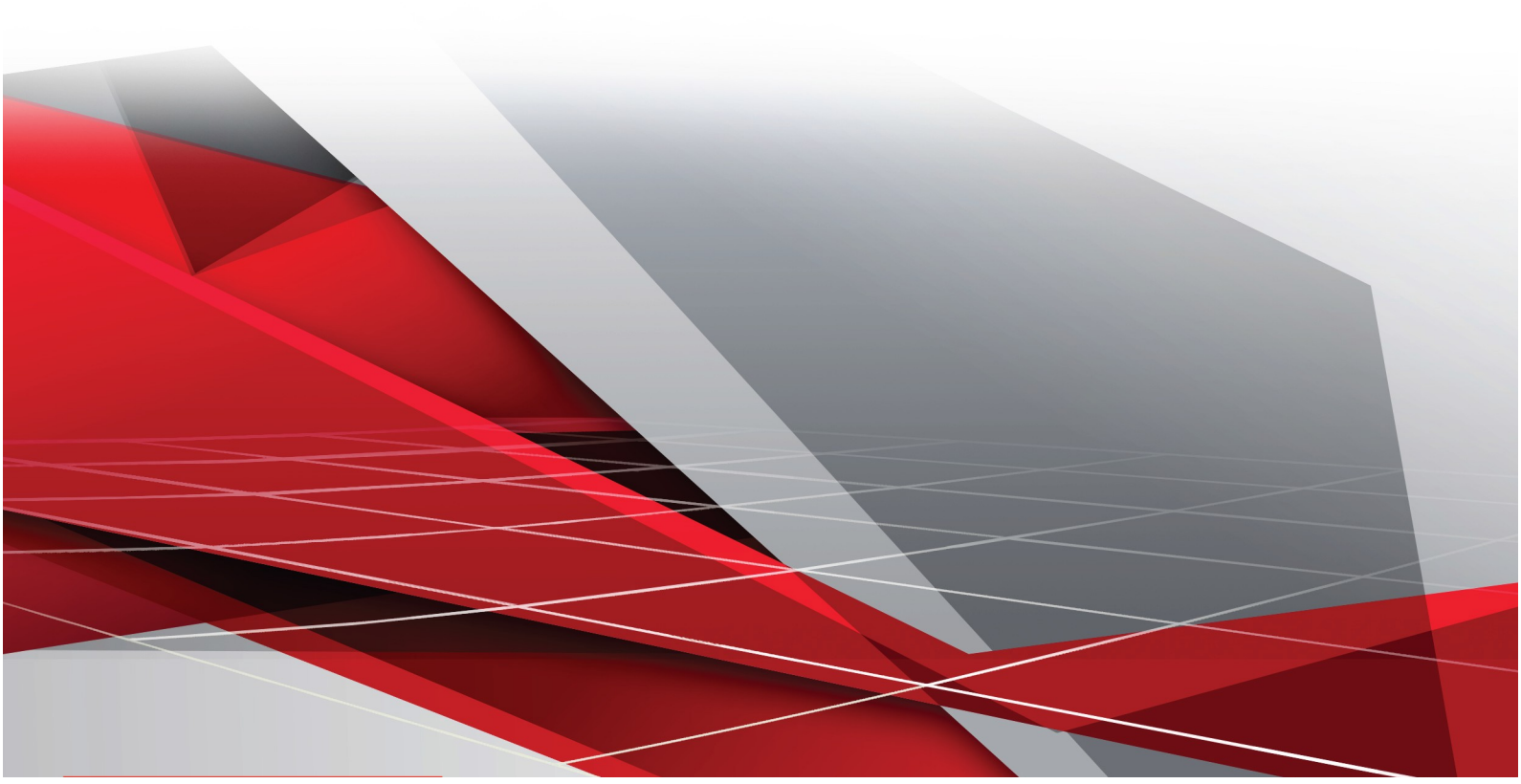
Oracle

Field Service Cloud / Oracle Service Cloud Integration using ICS

Release February 2017



Contents

Preface

This document describes the integration between Oracle Field Service Cloud (OFSC) and Oracle Service Cloud (OSvC) using the Oracle Integration Cloud Service (ICS). It covers the requirements, setup and usage of the integration.

This integration is designed to demonstrate how an integration scenario could be built using the public integration and extension capabilities of Oracle Field Service Cloud (OFSC) and Oracle Service Cloud (OSvC) using Oracle Integration Cloud Service (ICS).

This integration is provided to help customers and partners confidently leverage our platform and proven design patterns to meet their own unique needs.

In the pages that follow, we document the detailed setup steps required to deploy the integration.

This guide accompanies the files that contain the necessary components to setup and demonstrate the MVP (Minimum Viable Product) integration presented here.

It is a starting point that shows how Oracle Service Cloud and Oracle Field Service Cloud can be connected to create a value-added business process and user experience. An implementer must enter the documented configurations and install the documented patches to create the MVP integration.

However, it is not meant to be a turnkey solution. Each customer's implementation of Oracle Service Cloud and Oracle Field Service Cloud is unique, and each customer has different needs that have led them to implement customizations that support their unique business requirements. While the steps in this document describe how to connect a non-customized Oracle Service Cloud instance to a non-customized Oracle Field Service Cloud instance, they could be combined with other customizations that have already been applied to a customer's instances.

Although the code delivered through the Accelerator Program has been developed thoughtfully, you should test and review it thoroughly in your own environment to ensure it meets your specific goals, including security and scalability.

Disclaimer: The sample code and content of this document is not certified or supported by Oracle; it is intended for educational or testing purposes only.

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- For web-based user guide, http://documentation.custhelp.com/ci/documents/detail/5/4/12.
- For tutorials, http://documentation.custhelp.com/ci/documents/detail/5/3/12.

Thank you for helping us improve our documentation.

1 Integration Requirements

In order to configure the OFSC / OSvC integration using ICS, the following are required:

Software

1. Oracle Field Service Cloud instance, version 17.2 or greater.
2. Oracle Service Cloud instance, version 16.8 or greater.
3. Oracle Integration Cloud Service instance.

Files

Download the following files:

1. ICS Integration par file (OFSC-OSvC.par).
2. Setup script to migrate OFSC resources to OSvC.
3. OSvC Custom Object XML.

2 Integration Setup

This section will discuss how to configure the integration.

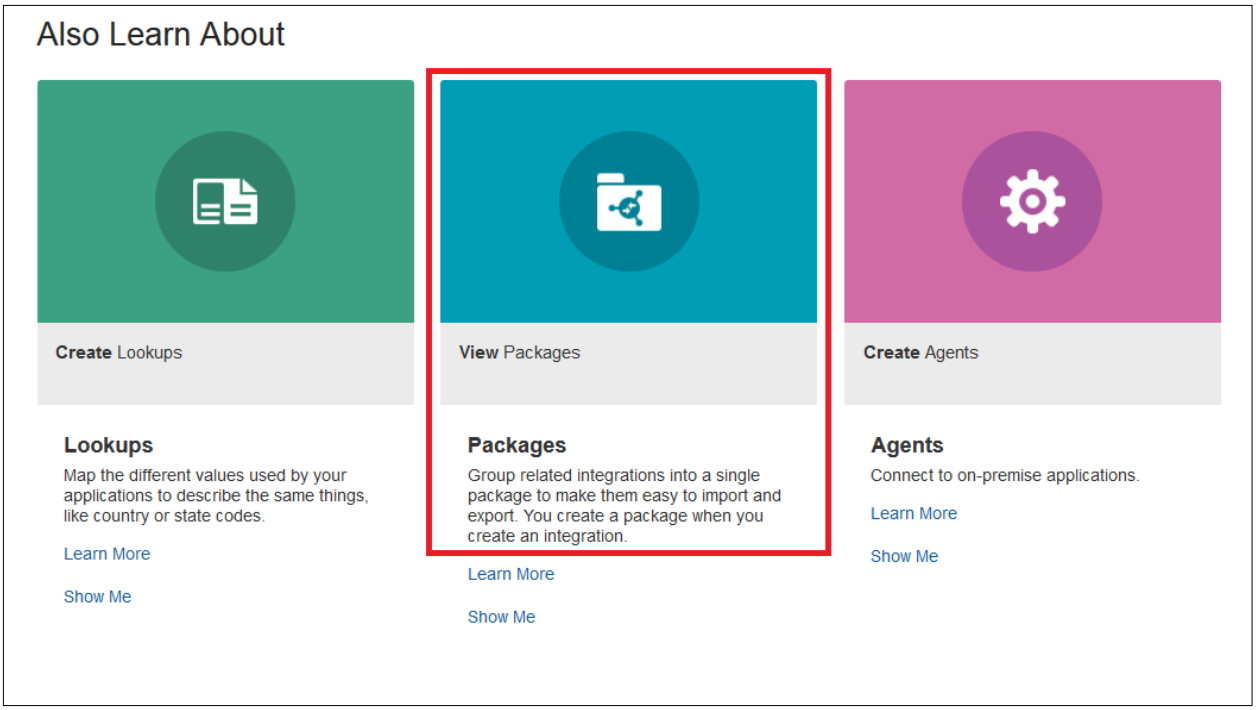
Important: The username used to configure Integration Cloud Service and Oracle Field Service Cloud must match for echo suppression. The default username is *icsuser.* To use a different username, see the section *Modifying the Echo Suppression User*.

Configuring Integration Cloud Service

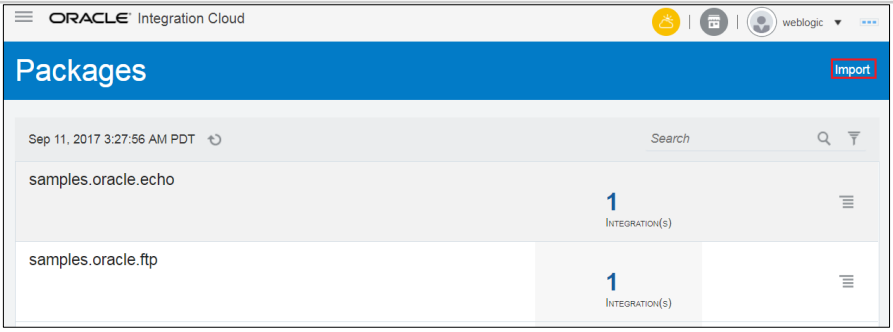
Importing integration par file and activating integrations within ICS.

Steps

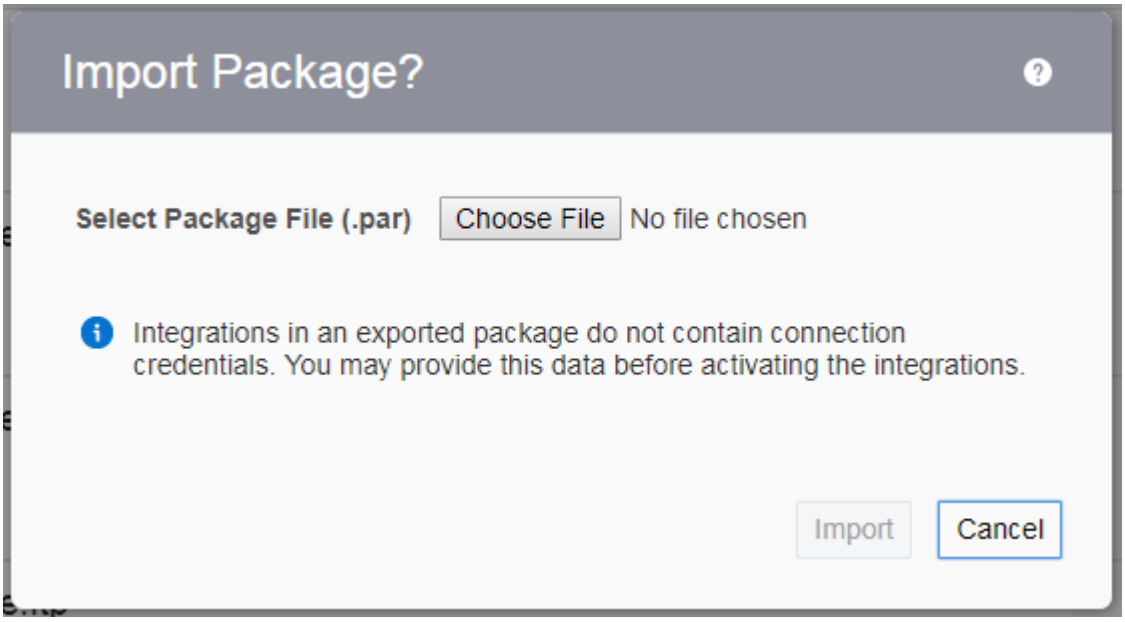
1. Save the integration par file OFSC-OSvC.par in your local folder.
2. Login to your ICS instance, and select Packages from the list of items shown in the home screen.



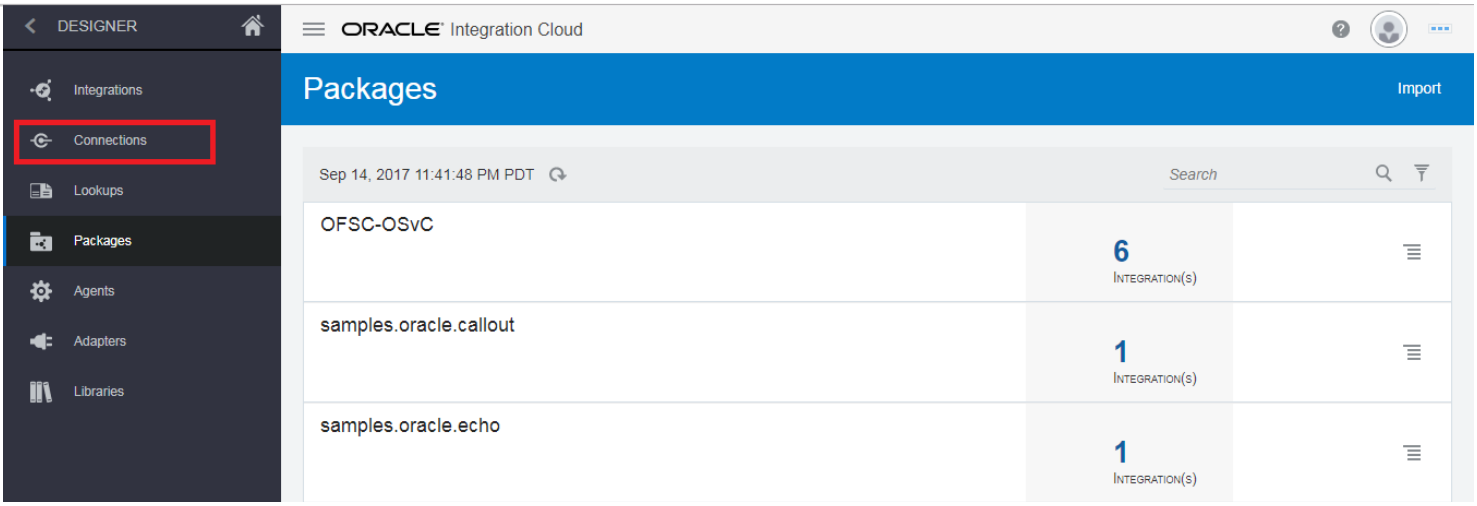
3. Click the **Import** button on the packages screen.



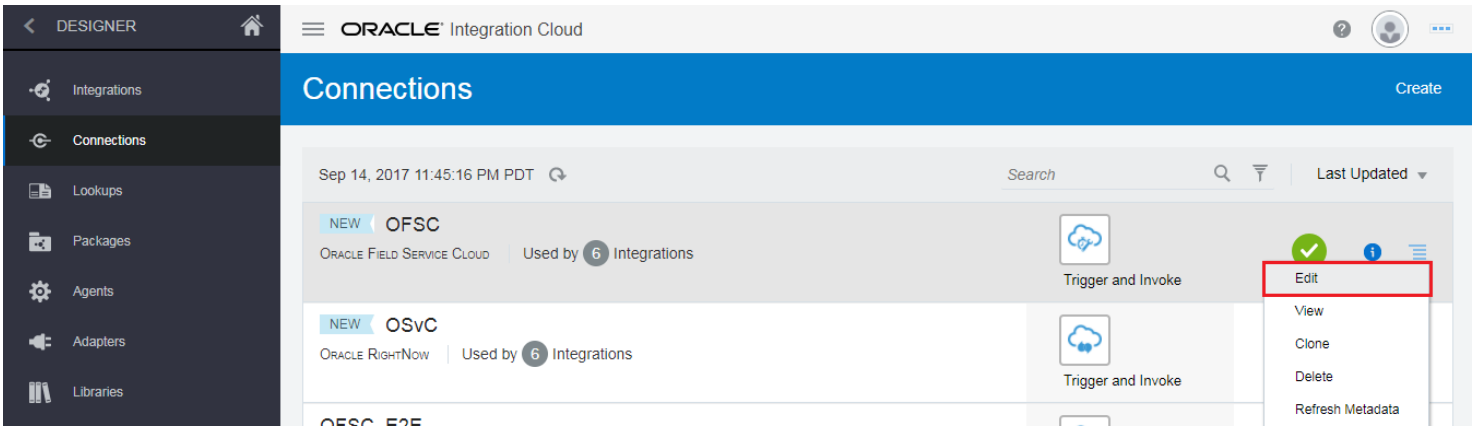
4. Click the **browse** button on the *Import Package* window and open the integration par saved in your local machine. Then click the **Import** button.



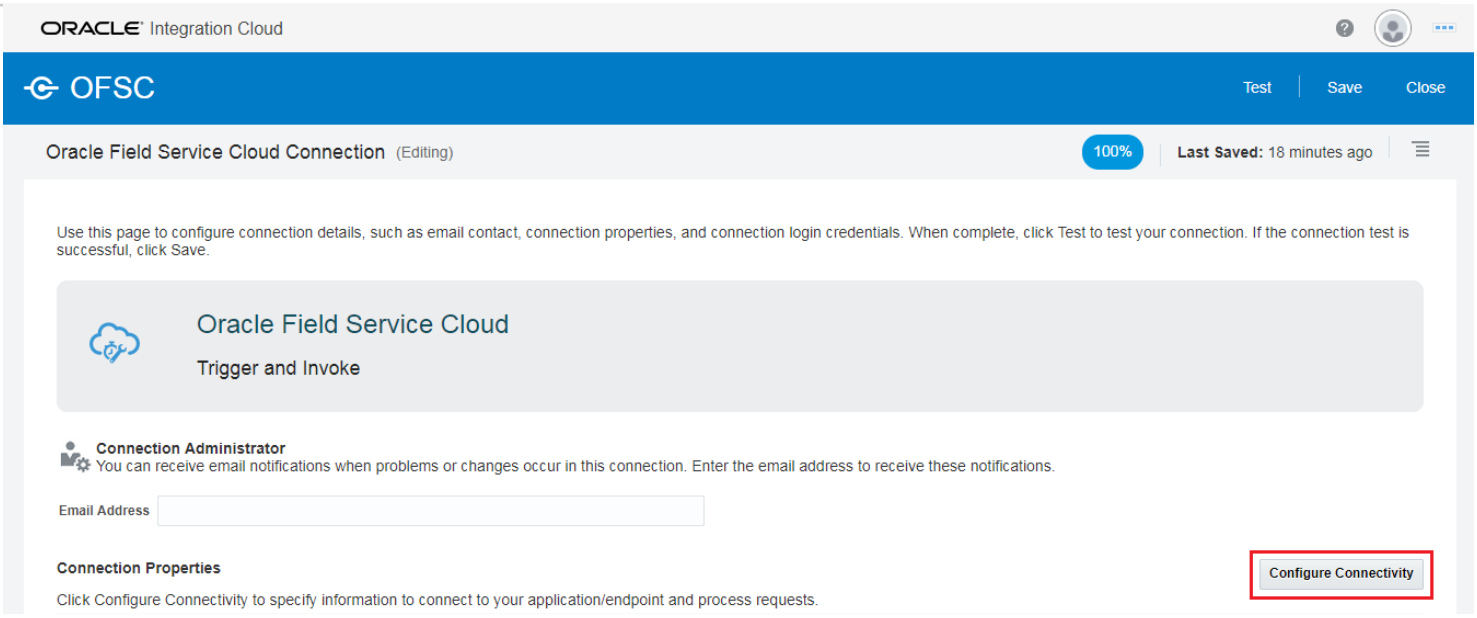
5. Go to the *Connections* page by clicking **Connections** from the list of items displayed on the left of screen.



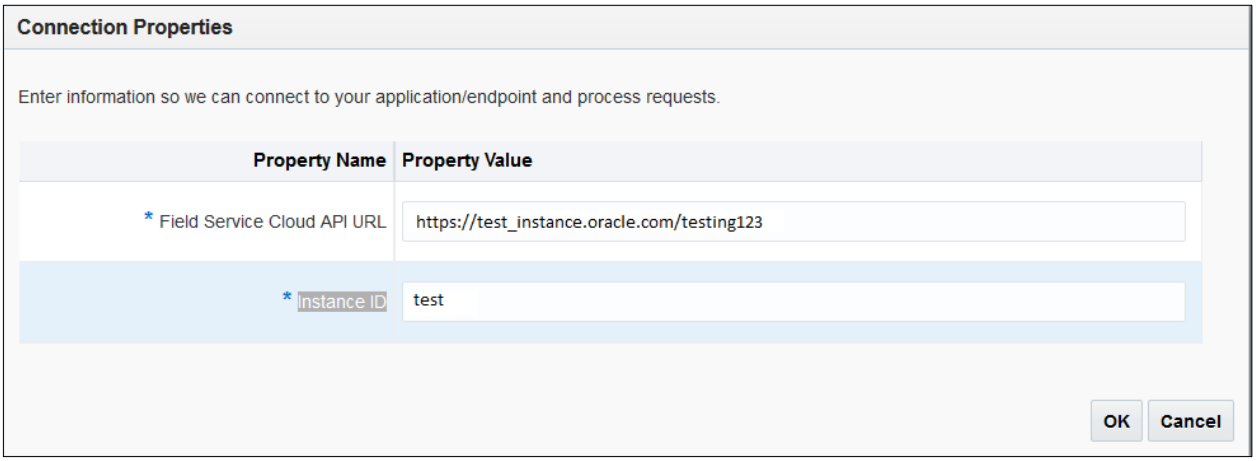
6. Edit the OFSC connection. Select **Edit** from the connection Actions menu.



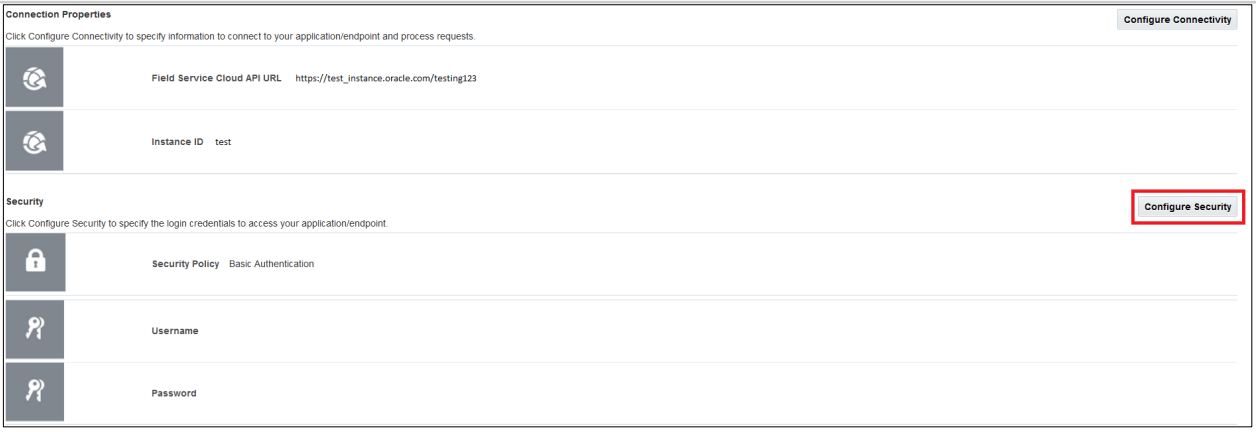
7. Configure connectivity by clicking the **configure connectivity** button.



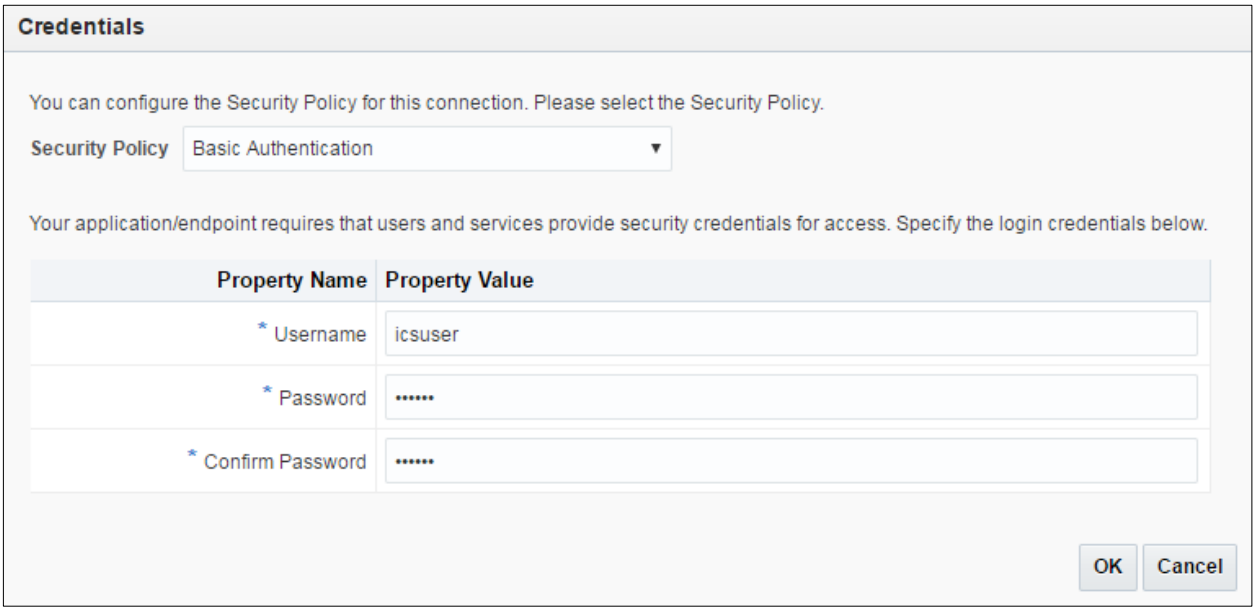
8. In the *connection properties* window, fill in the *Field Service Cloud API URL* and *Instance ID*. Then click the **OK** button.



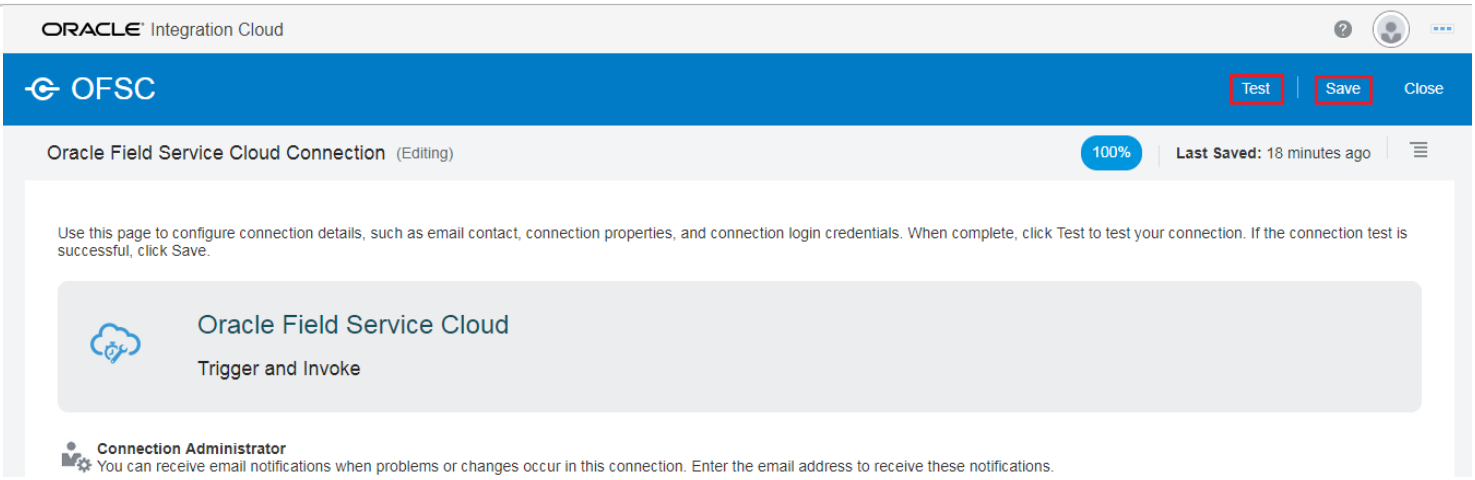
9. Click the **Configure Security** button in the edit connection screen.



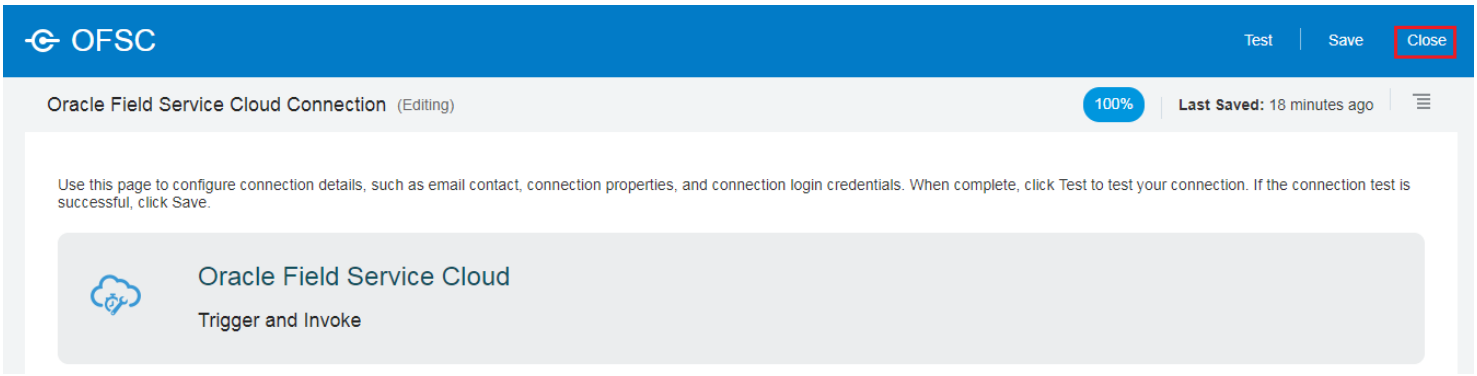
10. In the C*redentials* window, fill in the username, password and confirm password details. Click the **OK** button.



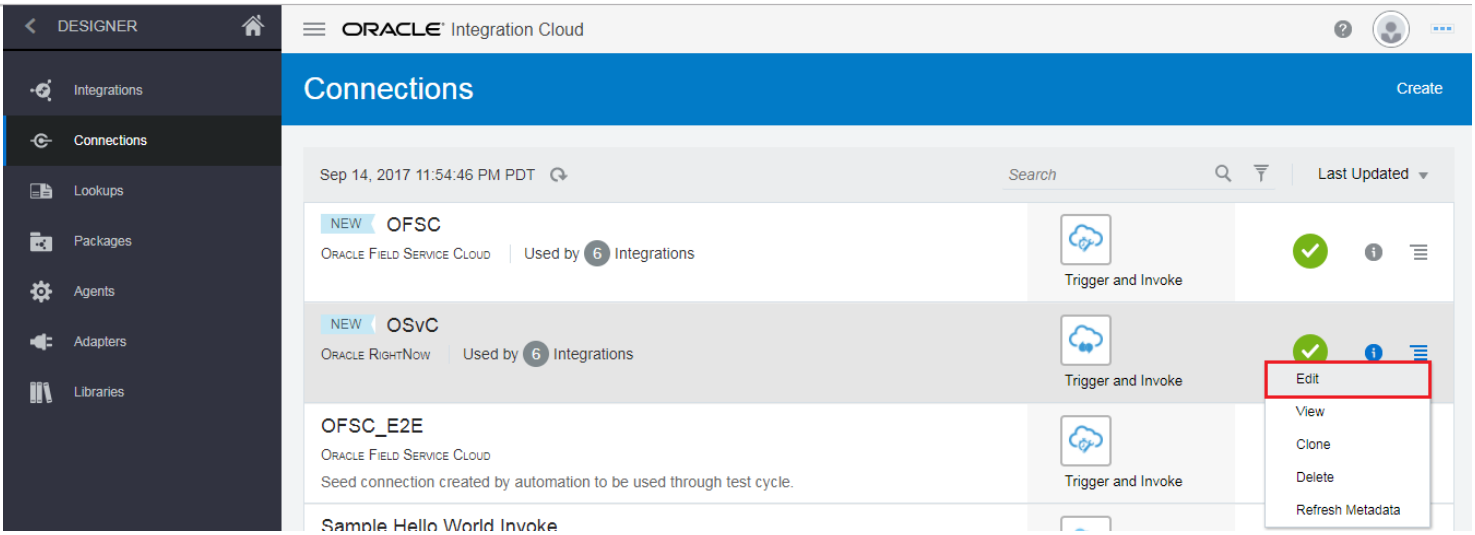
11. Save and test the connection by clicking the **Save** and **Test** buttons on the edit connection toolbar.



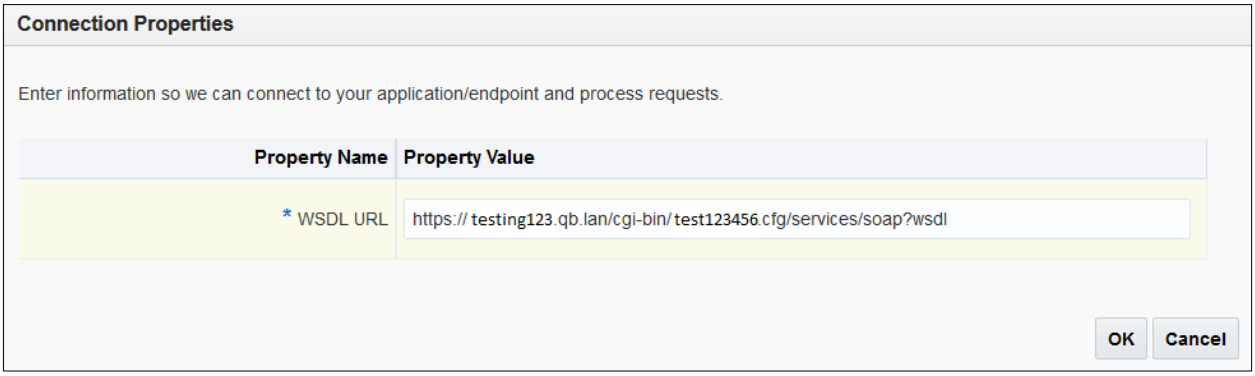
12. If the connection test is successful, the message "Connection OFSC was tested successfully." will be displayed. Then click the **Close** button.



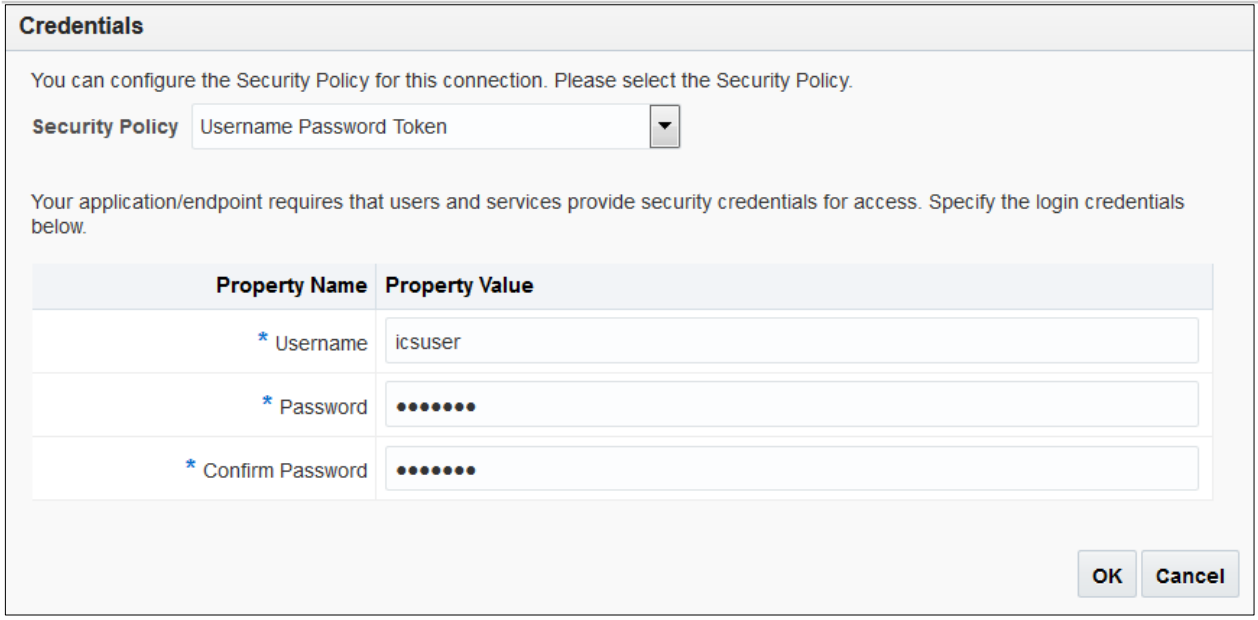
13. Edit the OSvC connection by selecting **Edit** from the *connection Actions* menu.



14. Configure connectivity by entering the *WSDL URL* for OSvC.

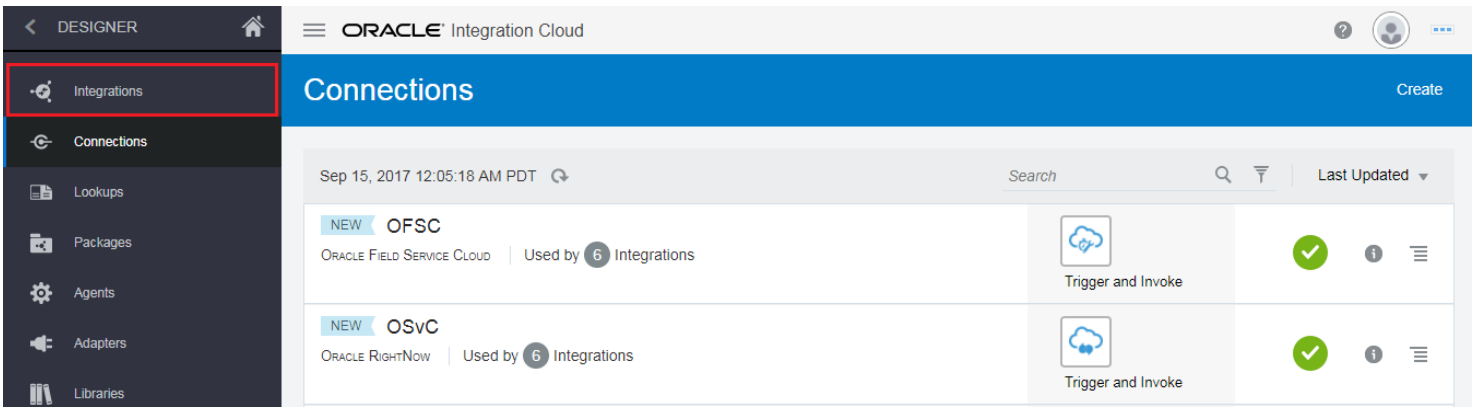


15. In the *Credentials* window, fill in the username, password and confirm password details. Click the **OK** button.



16. Save and Test the connection. Then click the **Close** button.

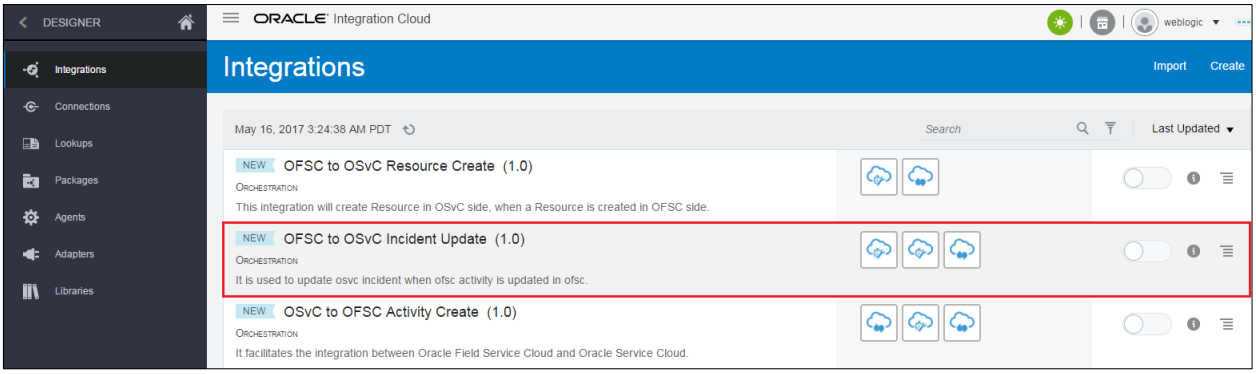
17. Click Integrations in the side menu to see all pre-built integrations in the OFSC-OSvC.par file.



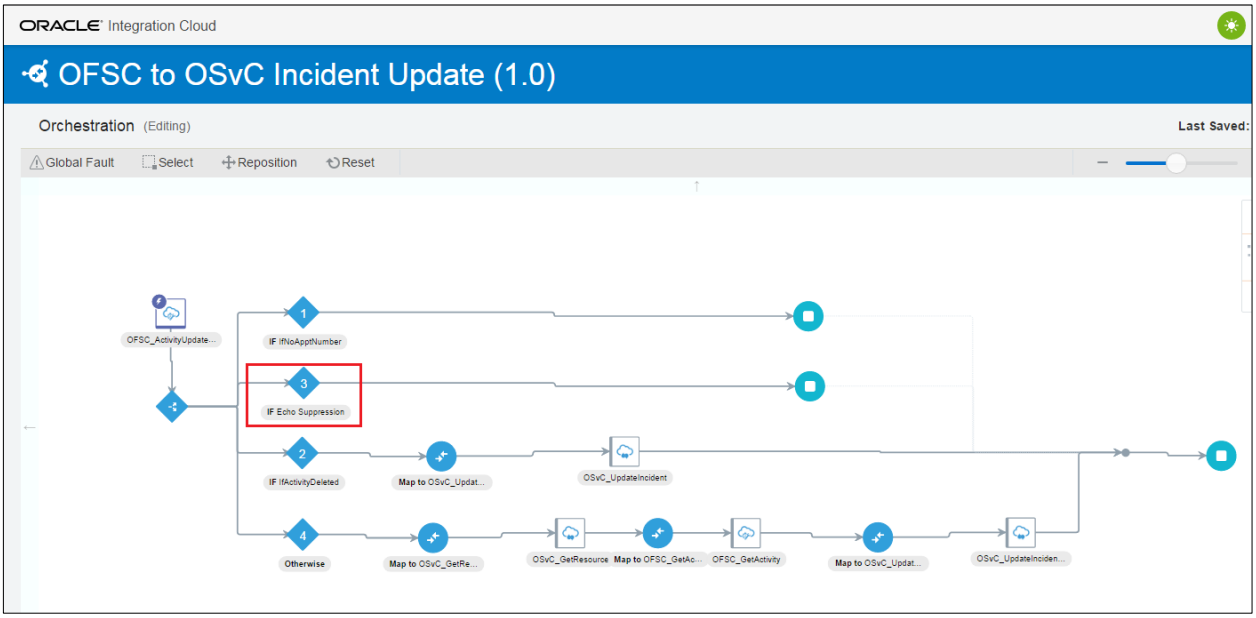
Modifying the Echo Suppression User

Steps

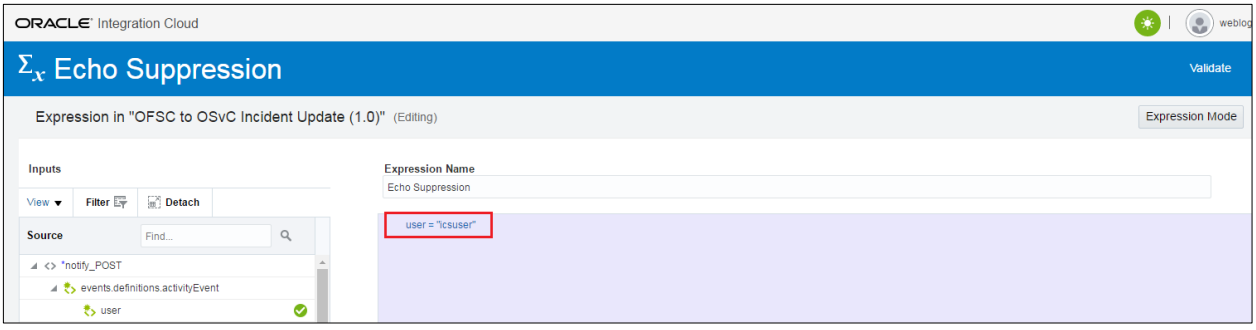
1. Select *OFSC to OSvC Incident Update* integration.



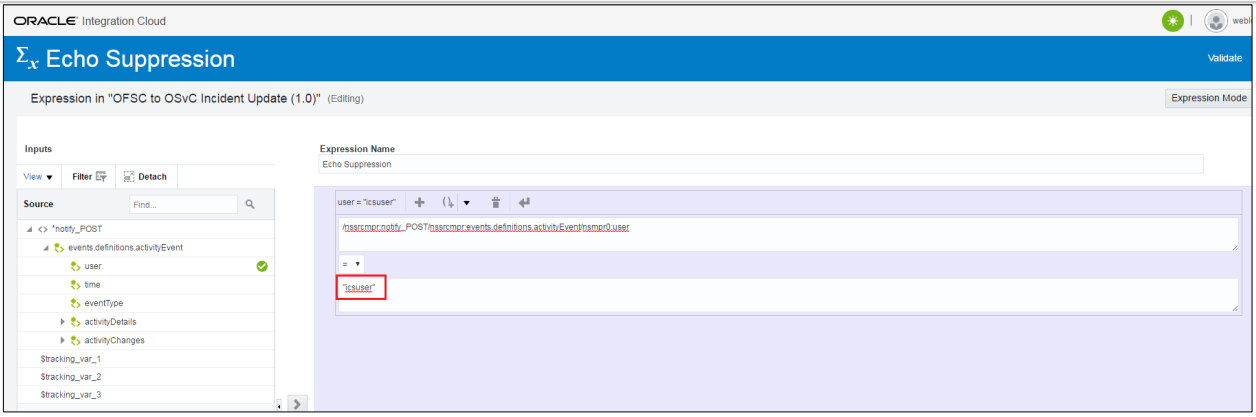
2. Open the *If Echo Suppression* edit screen.



3. Click to edit the user.



4. Modify the name of the user to match the username used to configure ICS in OFSC.



Configuring Oracle Field Service Cloud

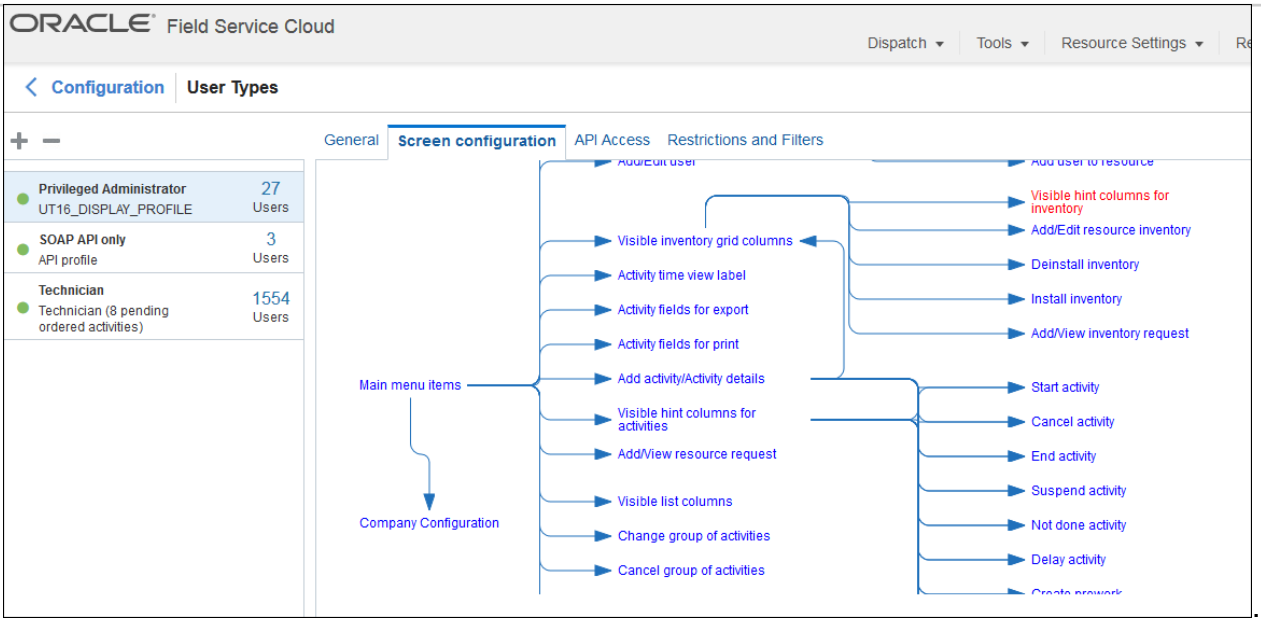
The ICS connection must be configured within OFSC.

Adding the ICS configuration option to OFSC

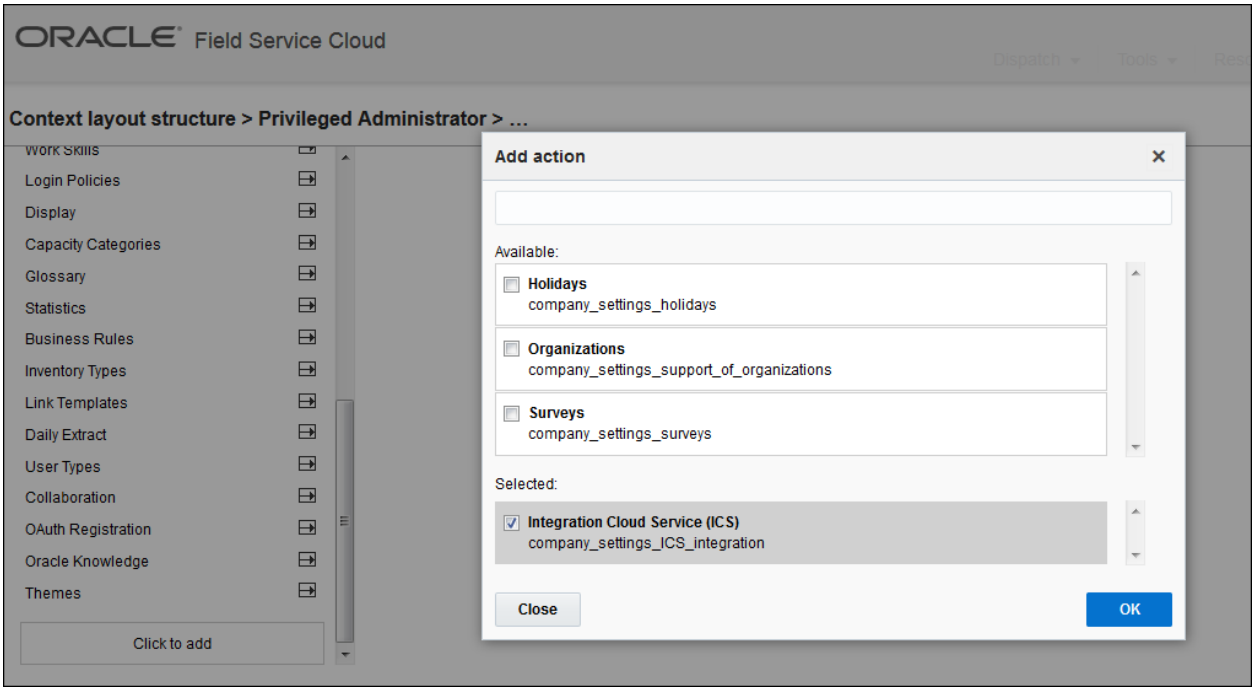
The ICS configuration option may not be visible within the OFSC instance. If it is not visible, add a new visibility for the menu option, as follows.

Steps

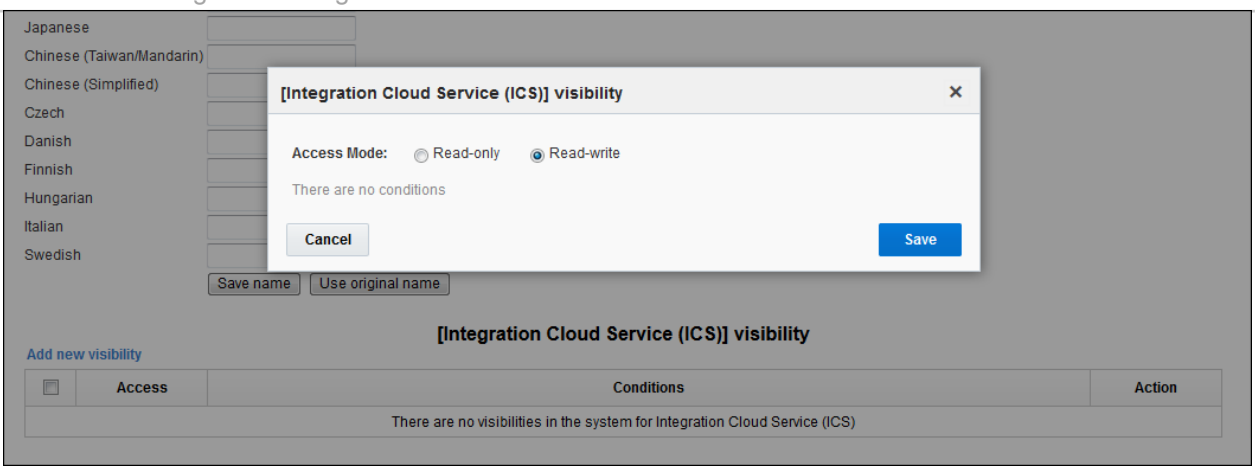
1. Go to *Configuration - User Types*. Select the appropriate user profile and go to screen configuration.



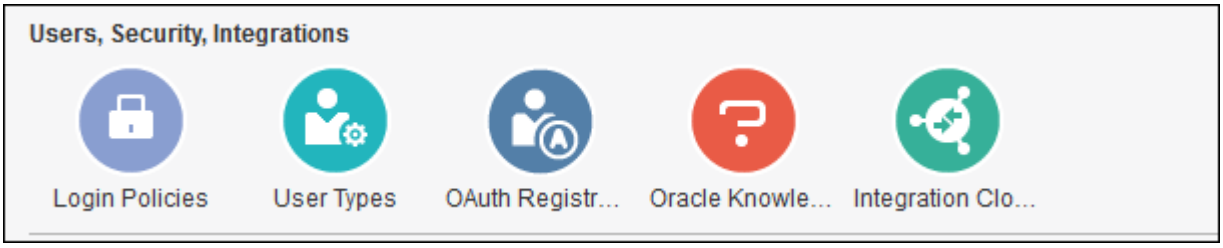
2. Select company configuration. Add the *Integration Cloud Service (ICS)* action to the menu list.



3. Add a new visibility (read/Write) then select *Save*.



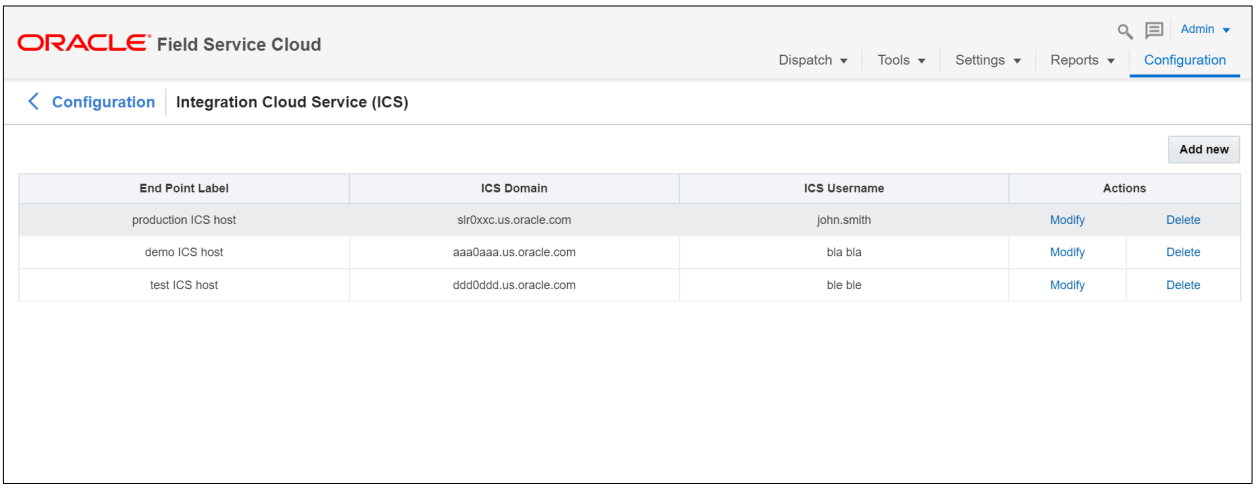
4. The ICS configuration option shows up under the users, security integrations section of the configuration menu.



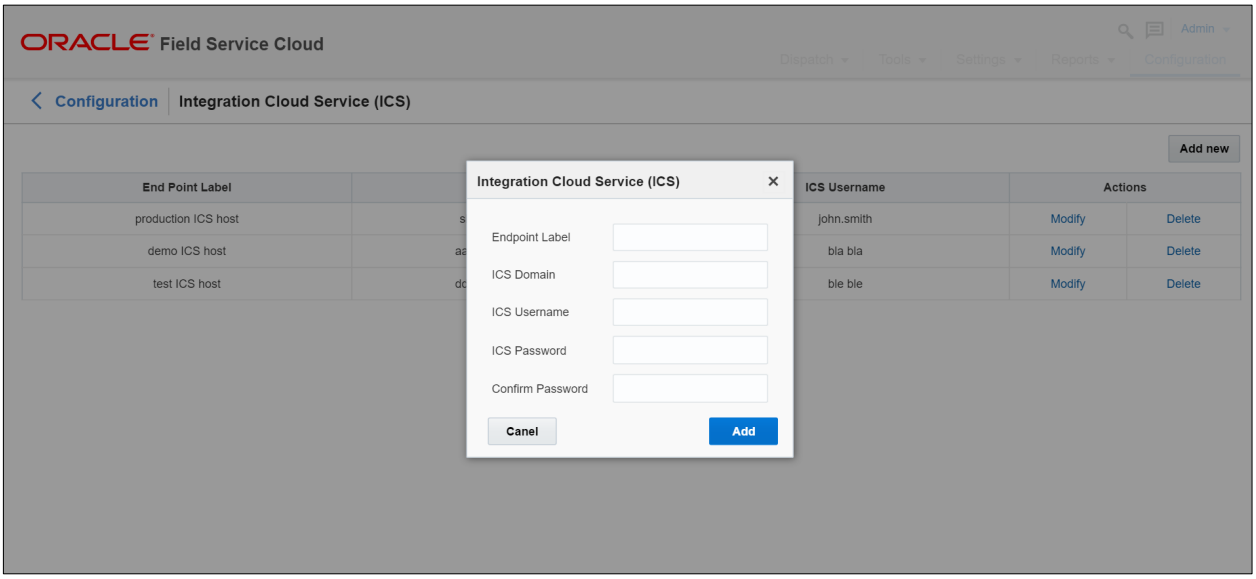
Once the *Integration Cloud Service* option is available, a new ICS configuration can be added.

Adding a new ICS configuration

Steps



1. Click **Add new**.



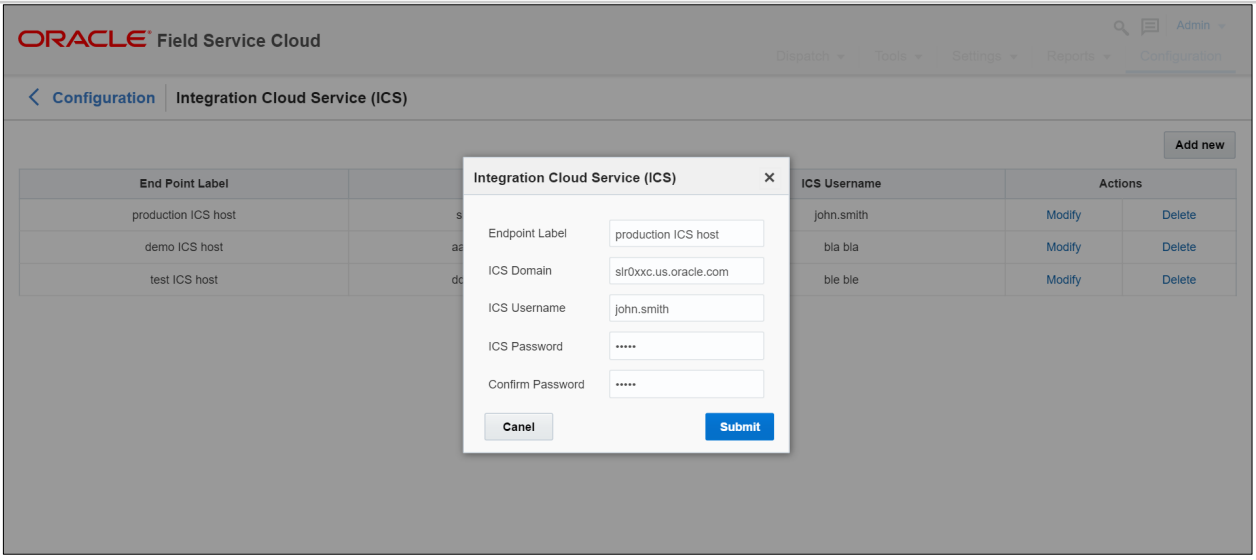
2. Enter the details of the ICS connection:

Endpoint Label: The identifier of the integration within OFSC
ICS Domain: Enter the host name for ICS domain (e.g. slr0xxc.us.oracle.com)
ICS Username: Login name for ICS domain
ICS Password: Enter password for ICS domain
Confirm Password: Confirm ICS domain password

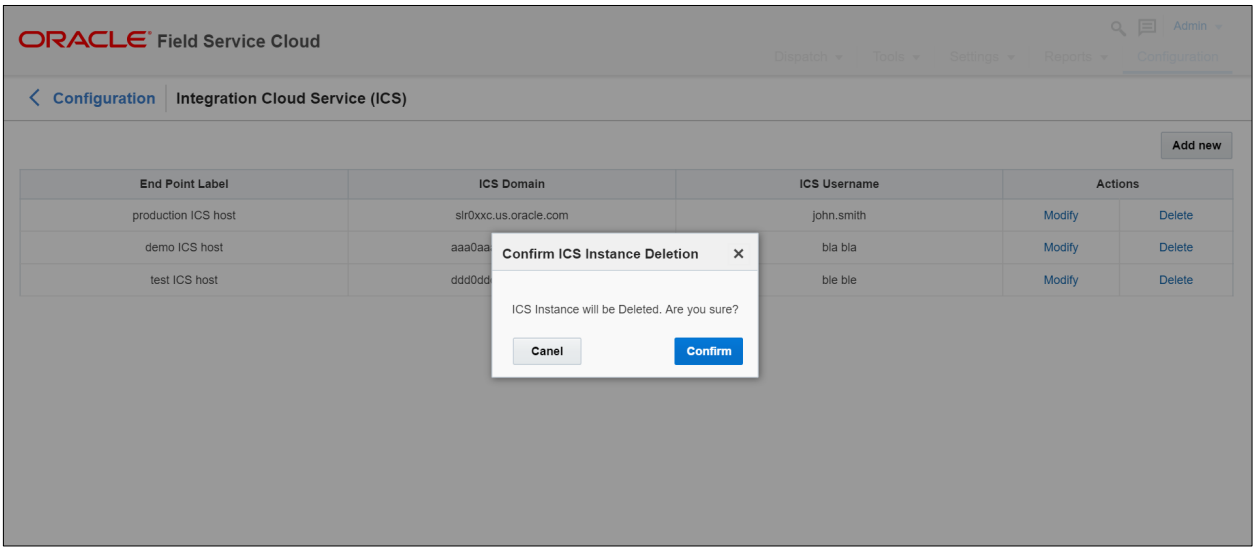
Modify or Delete an existing ICS connection

Once a connection has been added, it can be modified or deleted.

Modify - Change the details of the selected configuration.



Delete - Remove the selected configuration from the list.



Configuring Oracle Service Cloud

Run the initial setup script

Running the script will migrate resources from OFSC to OSvC.

Steps

1. Save the migration-script folder in your local machine.

   Linux users:

2. Navigate to Linux folder inside Script folder in command prompt.
3. Update the config.txt file with the application connection details and login credentials
4. Run script by entering command ./getResources.sh

Important: The Linux script requires Oracle or Red Hat Linux version 7 and above.

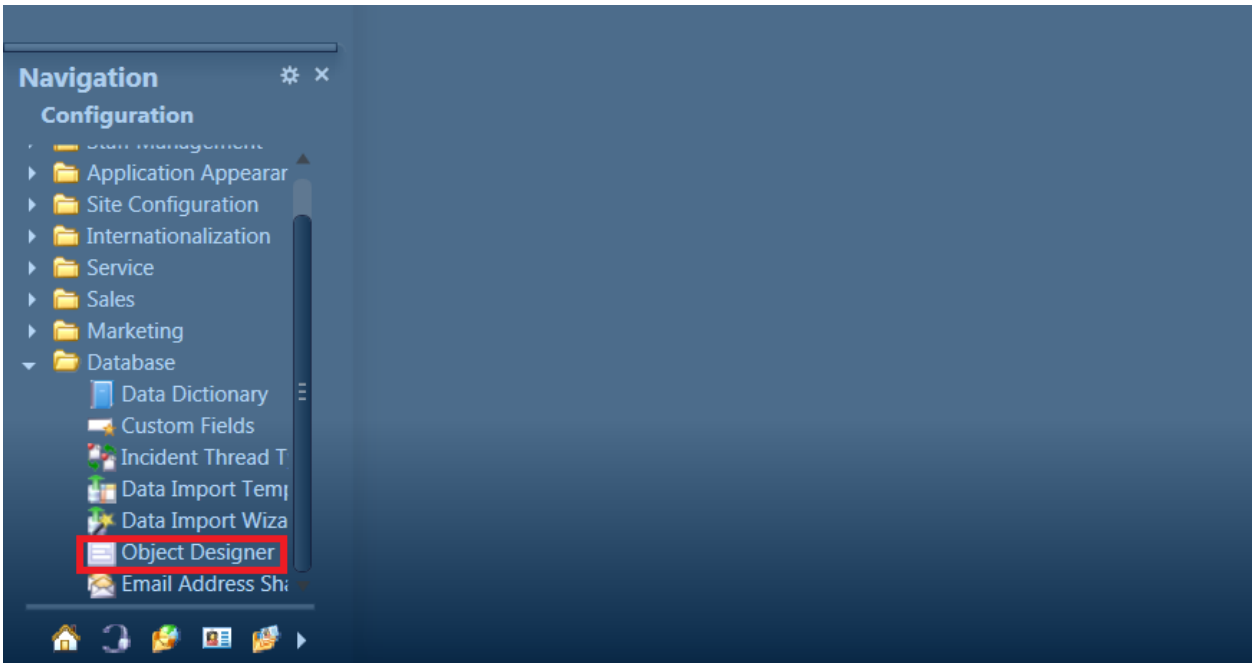
Windows users:

1. Navigate to Windows folder inside Script folder in windows power shell.
2. Update the config.txt file with the application connection details and login credentials
3. Run script by entering command ./getResource.ps1

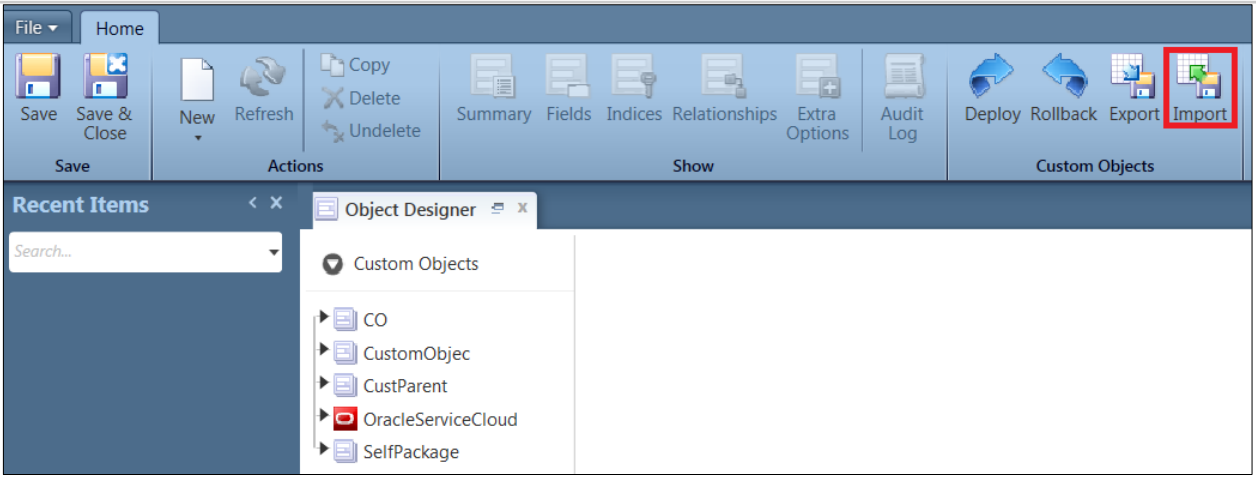
Importing custom objects in OSvC

Steps

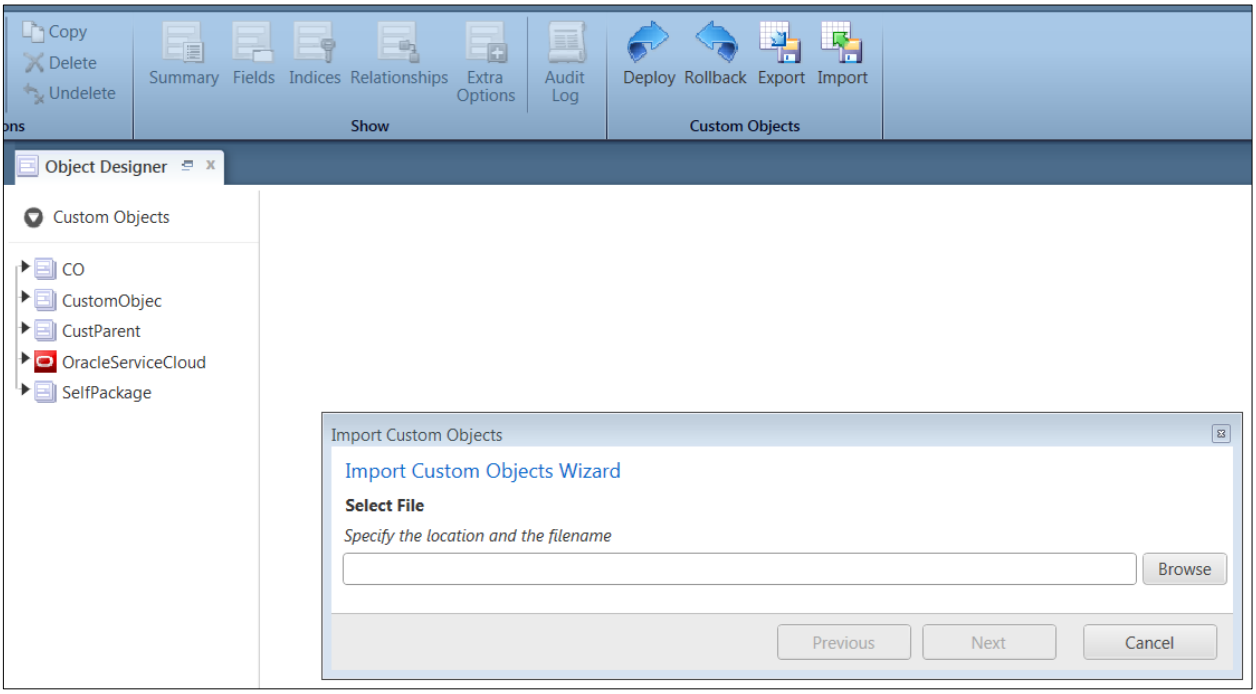
1. Login to the OSvC console.
2. In the navigation pane, select **Configuration** and then open the *Object Designer* under Database.



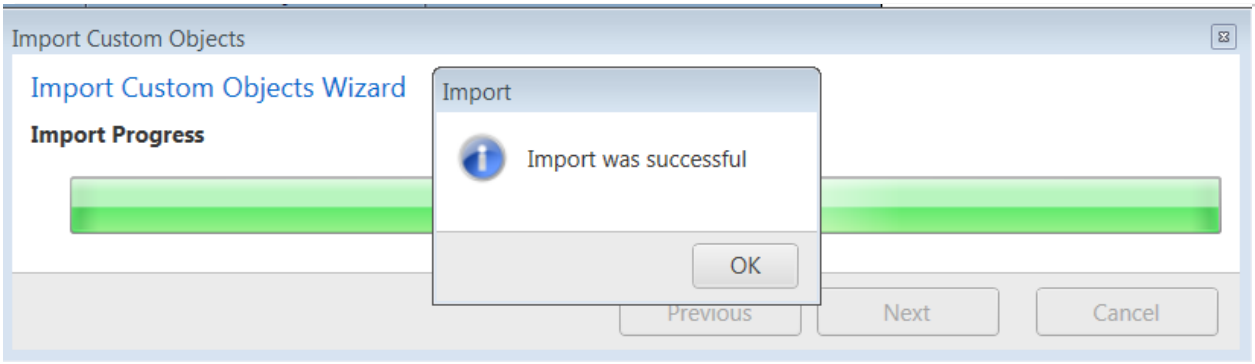
3. Import CustomObjects.zip by clicking the **Import** ribbon button in the Object Designer.



4. This will open the Import Custom Object Wizard. In the wizard browse and open the CustomObjects.zip file saved in your local folder. Click N**ext**.



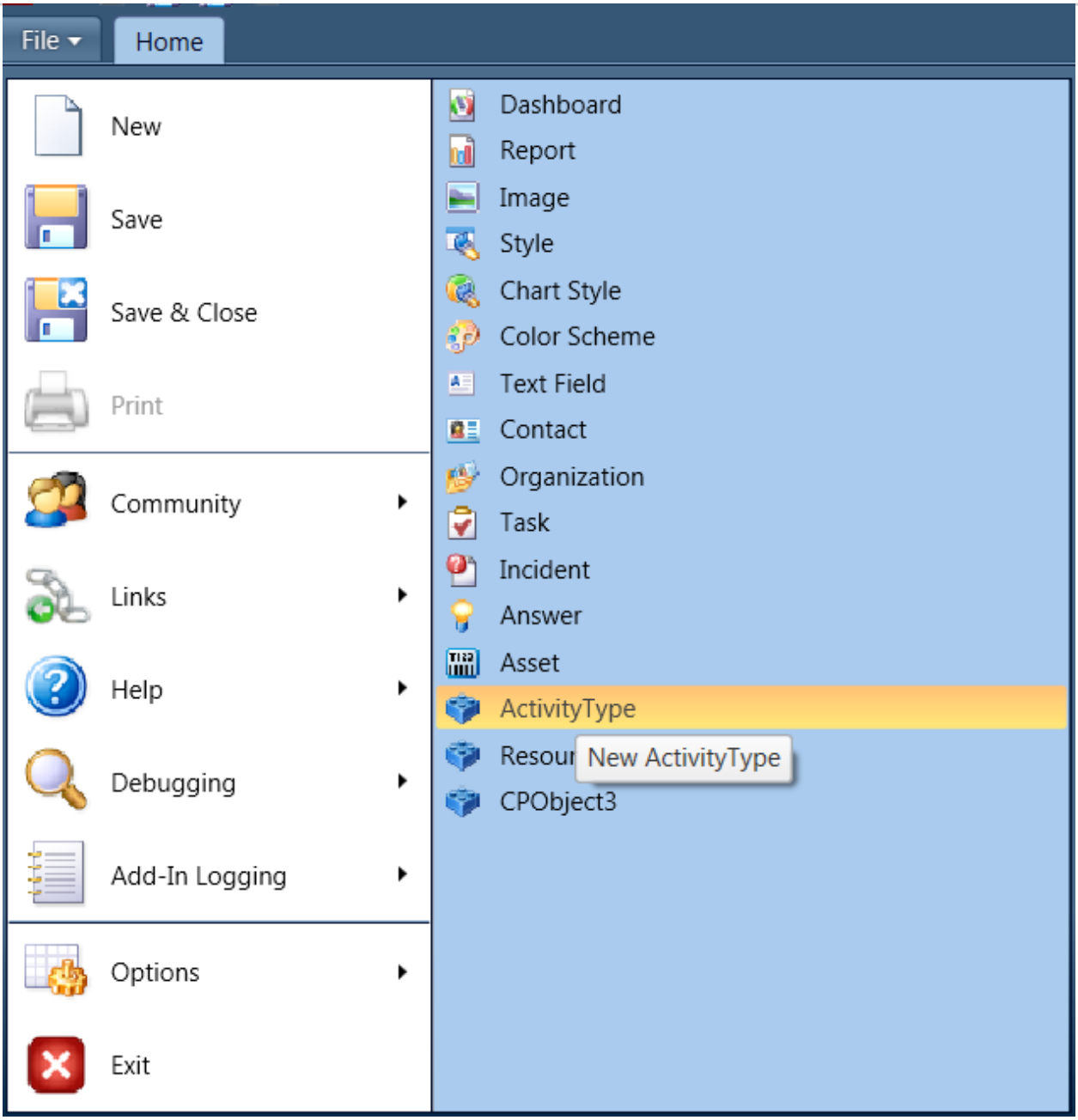
5. Import progress bar will be shown and once import is complete, an “Import was successful” message will be returned. Click **OK**.



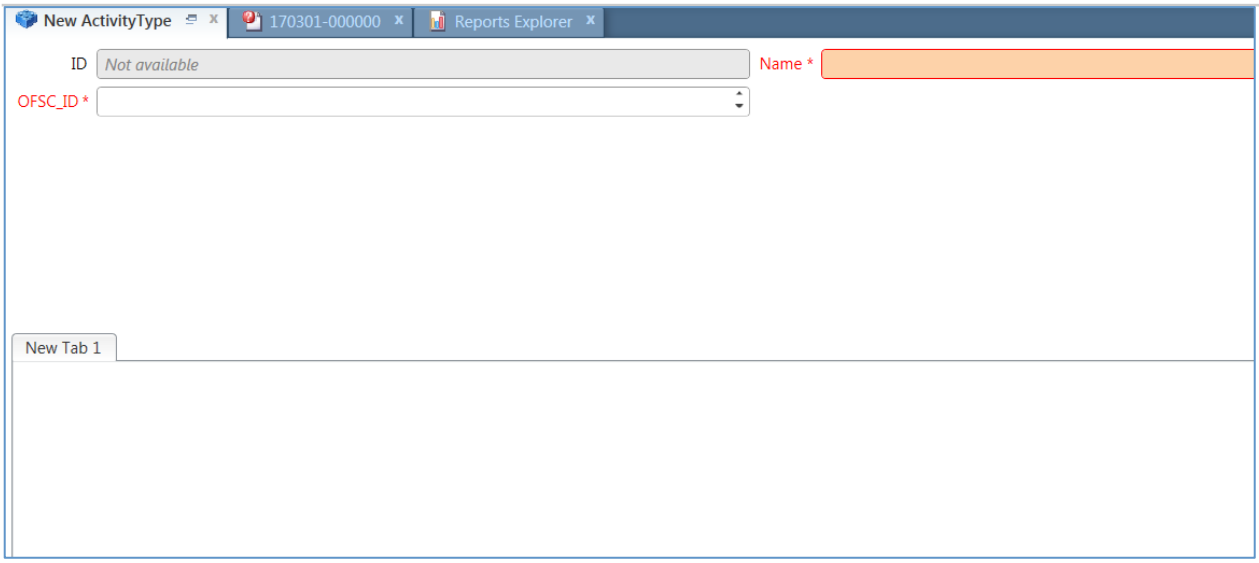
Creating Activity Types in OSvC

Steps

1. From the *File* menu, open the *ActivityType* workspace.



2. Create a new *ActivityType* by filling in the required fields, the name and OFSC_ID of the activity type.

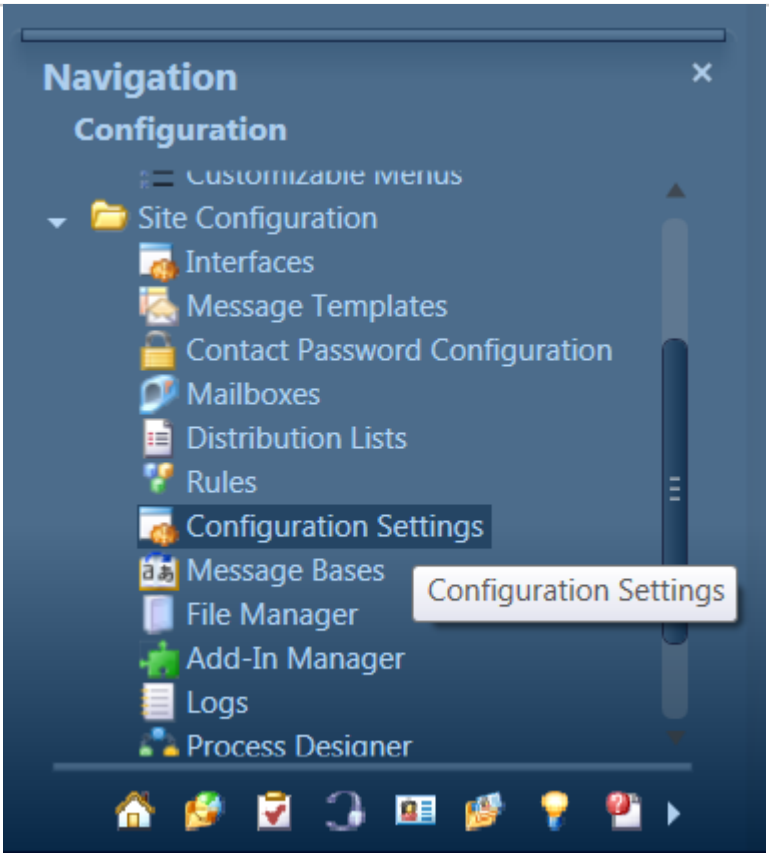


3. Save the *ActivityType.*

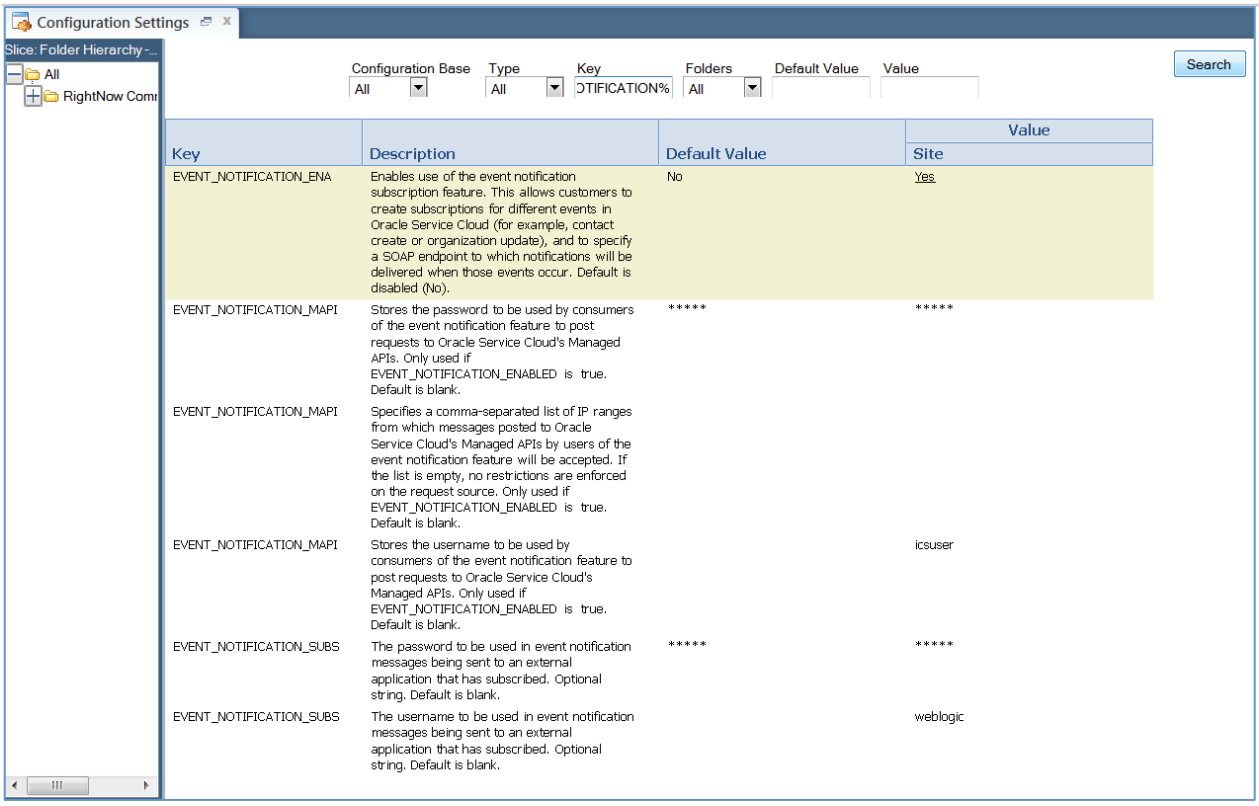
Configure Verb settings in OSvC

Steps

1. From the *Navigation* menu, go to *Configuration -> Site Configuration* and open *Configuration Settings.*



2. In the *Configuration Settings* screen, enter "EVENT_NOTIFICATION%" in the *Key* field and click the *search* button.



3. Set the value of the following configuration verbs, and save the changes:

   EVENT_NOTIFICATION_SUBSCRIBER_USERNAME -> (e.g. weblogic)
   EVENT_NOTIFICATION_SUBSCRIBER_PASSWD -> (e.g. welcome1)
   EVENT_NOTIFICATION_MAPI_USERNAME -> (e.g. icsuser)
   EVENT_NOTIFICATION_MAPI_PASSWD -> (e.g. test123)
   EVENT_NOTIFICATION_SUBSCRIBER_ENABLE -> YES

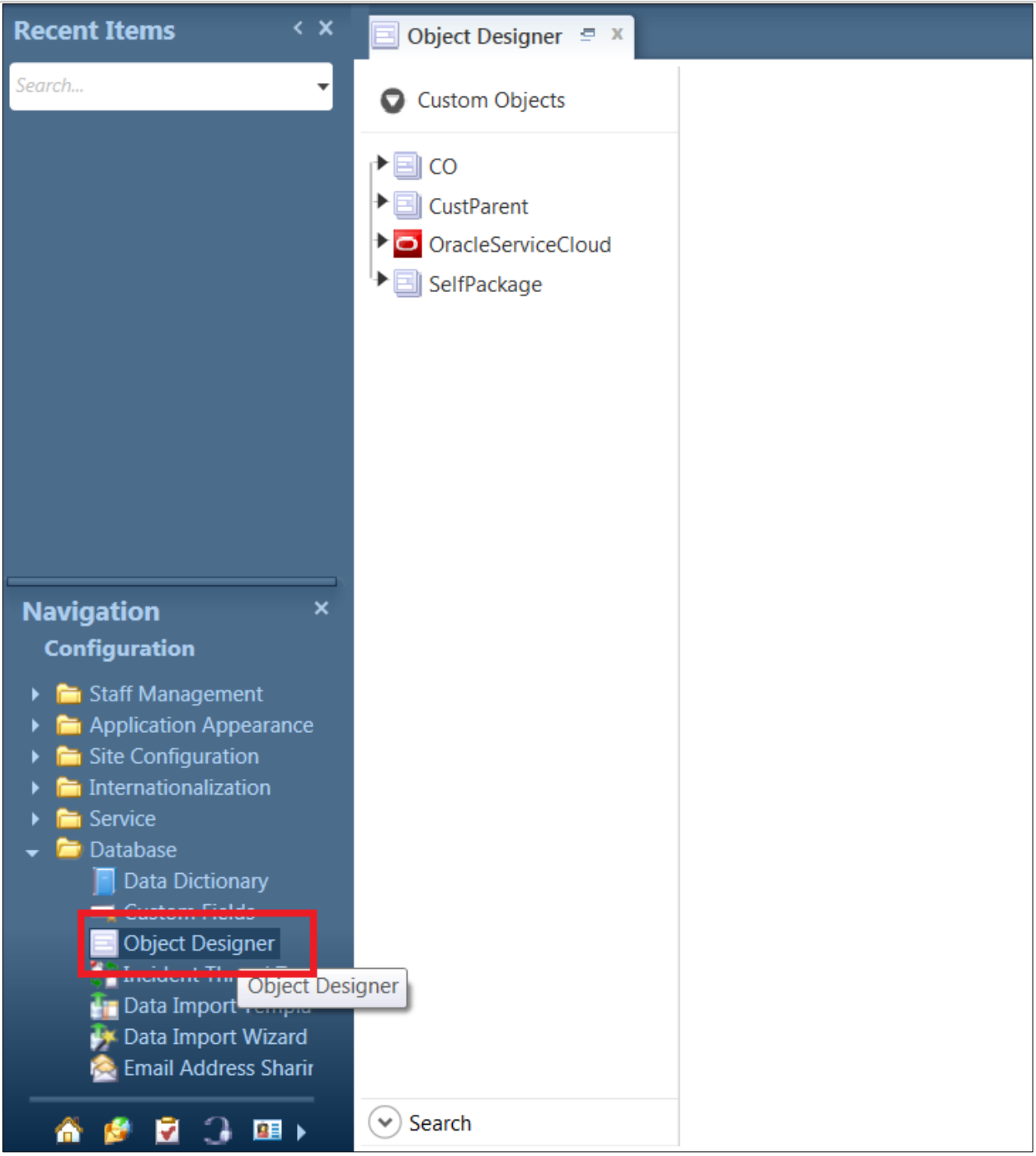
Important: The ICS username and password is required for the configuration

Creating TimeSlot and ReminderTime Custom Objects

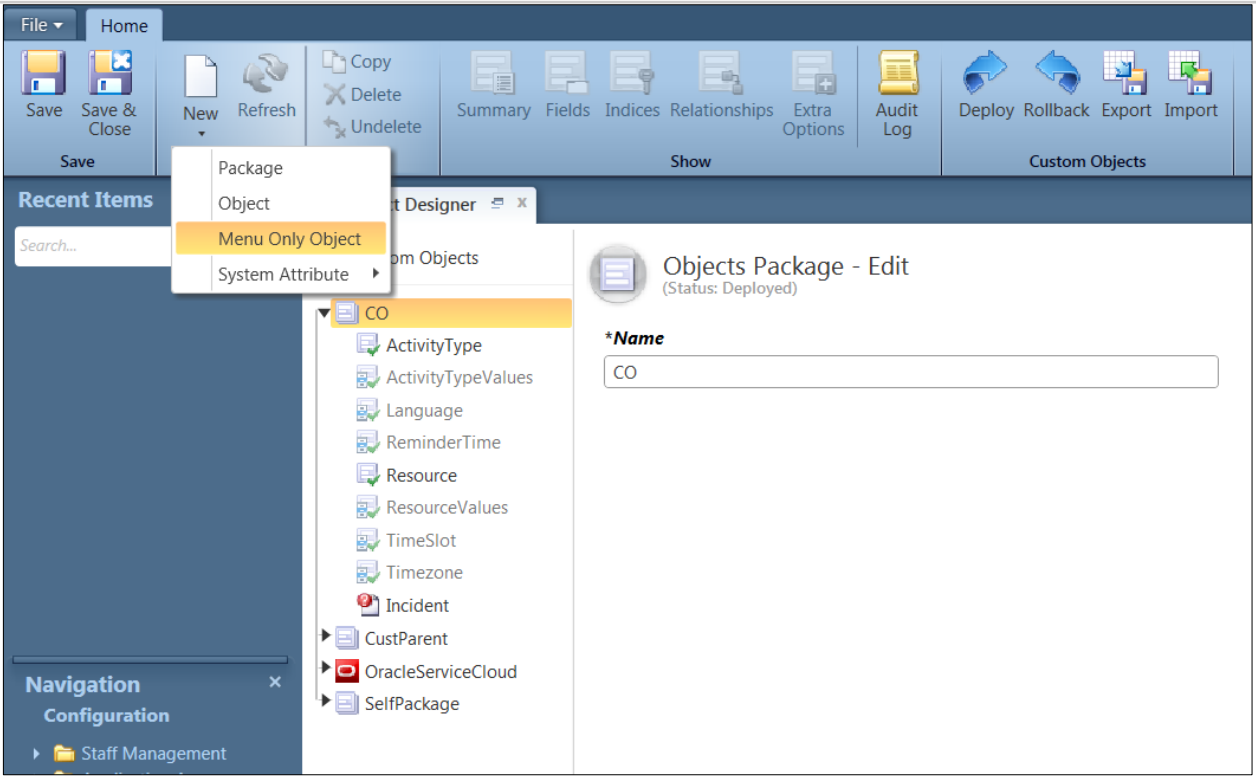
The CustomObjects.zip that was uploaded earlier already contains a TimeSlot and ReminderTime menu object. If you want to create your own, follow the steps below.

Steps

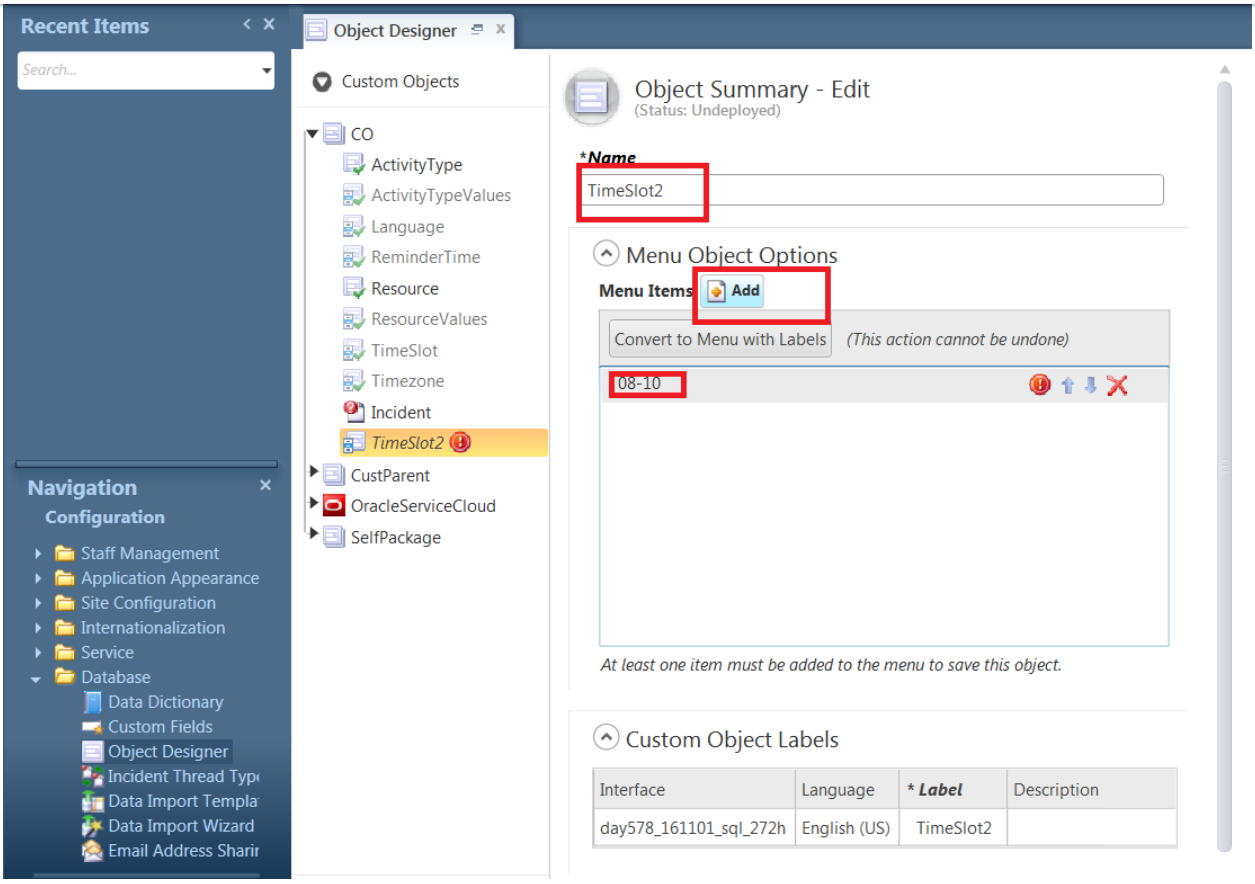
1. From the *Navigation* menu, go to *Configuration -> Database* and open *Object Designer.*



2. In the Object Designer, select *CO* from the side menu. Click the *New* button in the ribbon and then select *Menu Only Object* from the drop down.



3. In the *Object Summary - Edit* screen, fill in the Name (e.g. TimeSlot2) of the object. Click the *Add* button, and add the values to be shown in the menu.

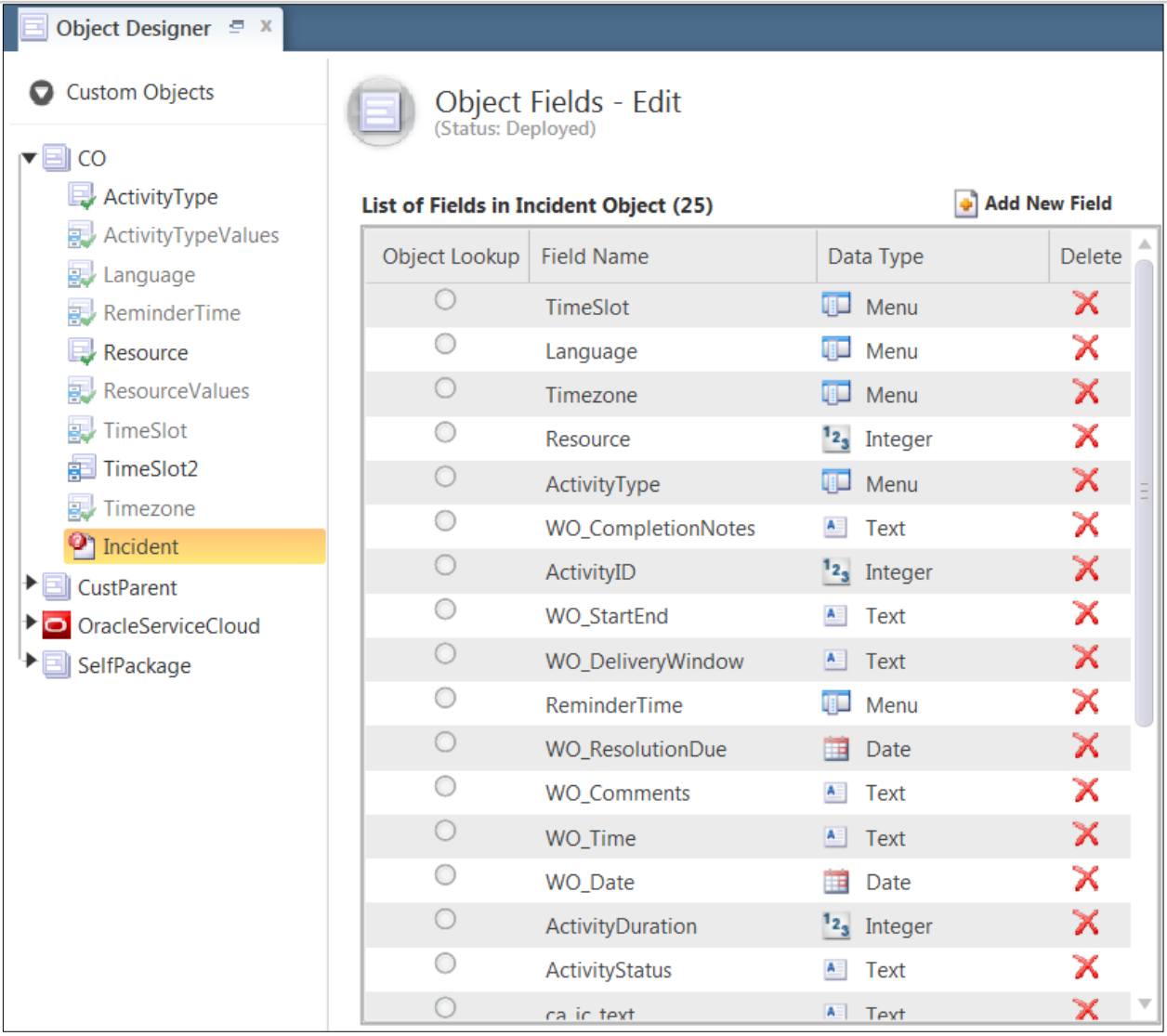


4. Save the *Object Designer.*

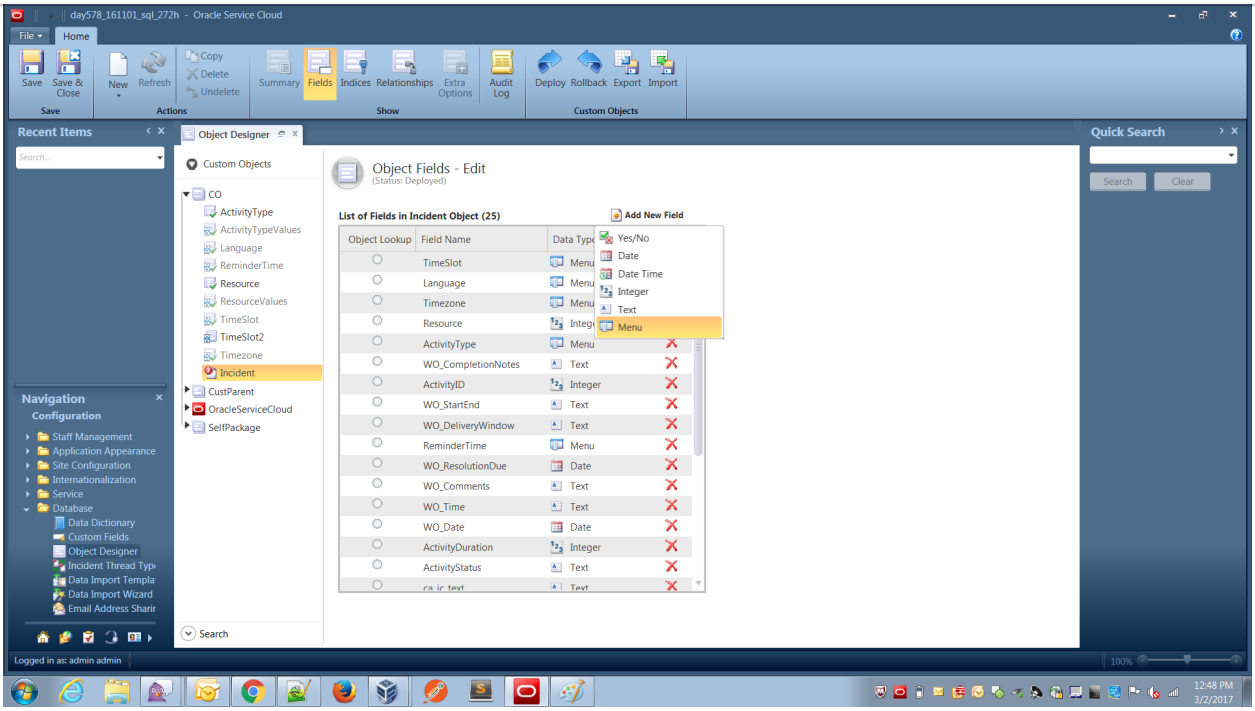
5. Follow steps 1-4 again to add the ReminderTime custom object.

6. Bind the newly created *TimeSlot* and *ReminderTime* custom objects to the incident workspace:

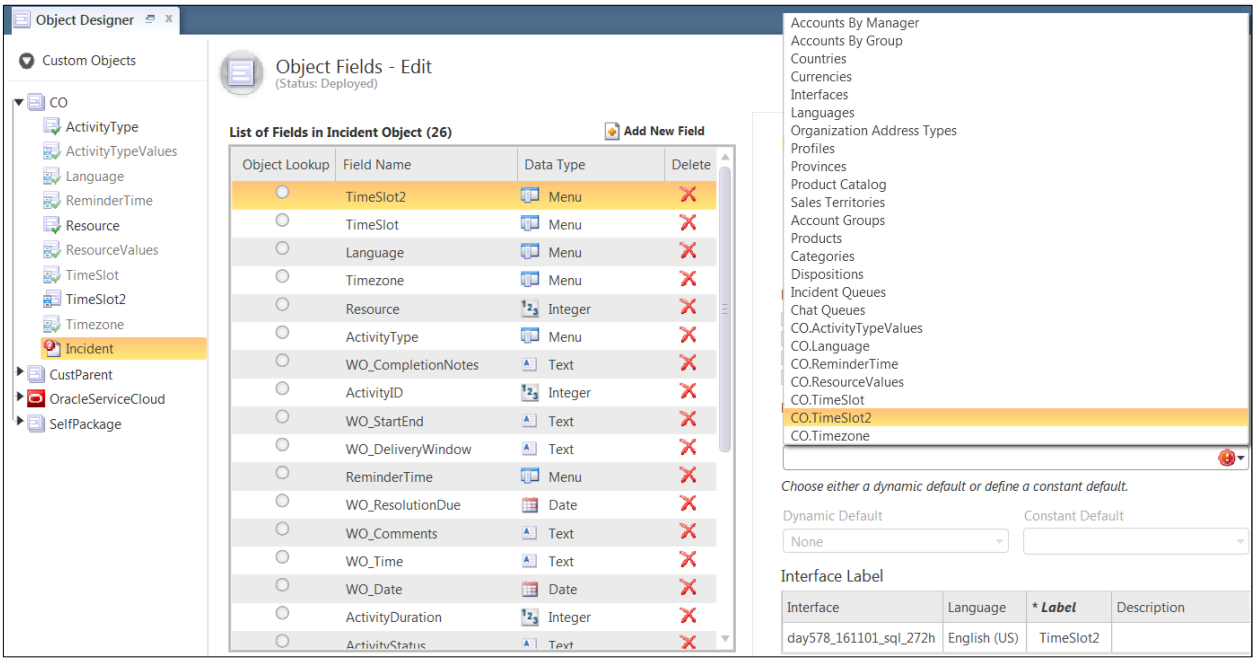
a. Select *Incident* under *CO* from the side menu in object designer.



b. Click the *Add New Field* button, and then select *Menu* from the drop down list.



c. In *Field Details*, fill in the *Name* value. Then fill in the *Menu* field value by selecting the required Menu object (CO.TimeSlot2 here) created from the drop down.

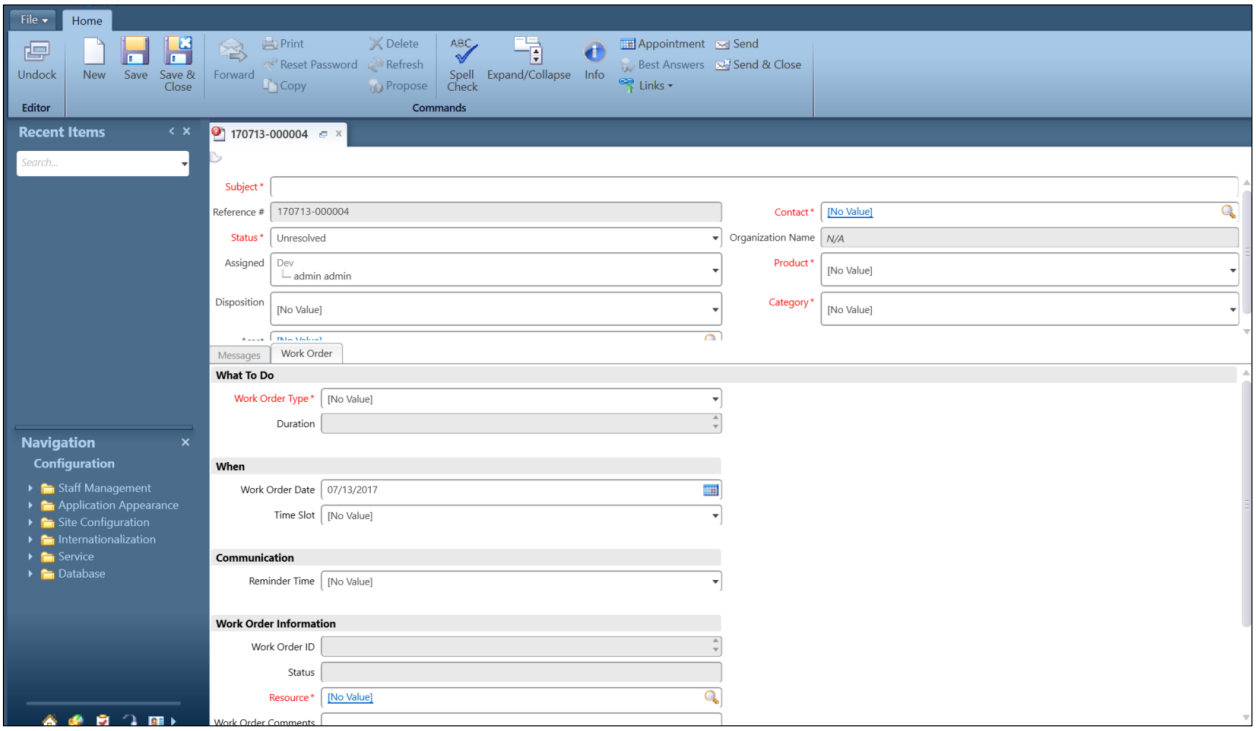


d. Save and deploy Object Designer.

e. Follow steps a-d again to add the *ReminderTime* menu item.

Configuring the Incident Workspace

A workspace was not included as a part of the pre-built integration files, since it will override the workspace that is currently in use. An incident workspace should be configured, per the example below:



3 Integration Demo Usage

Demo Scenario

Create an Incident

- Create an incident in OSvC and fill in all the required mandatory details
- In the Work Order tab enter the following information:
    - Activity Type
    - Resource
    - Time Slot
- A corresponding Activity should be created in OFSC with the following fields populated from OSvC: ResourceId, date, activityType, timeslot, customerName, customerPhone, customerEmail, streetAddress, city, postalCode, stateProvince, language, reminderTime

Update Activity

- Update any of the following fields in the OFSC activity:
    - Status
    - start - end time
    - SLA time
    - Activity Duration
    - Activity status
    - Resource Name
- The corresponding field in OSvC should be updated

Update Incident

- Modify any of the fields in OSvC that has a corresponding field in the OFSC activity
- The field in OFSC activity will be modified accordingly

Resource Update

- Create a resource that has the ability to get activities assigned to in OFSC

- The corresponding resource will be created in OSvC

Delete Incident

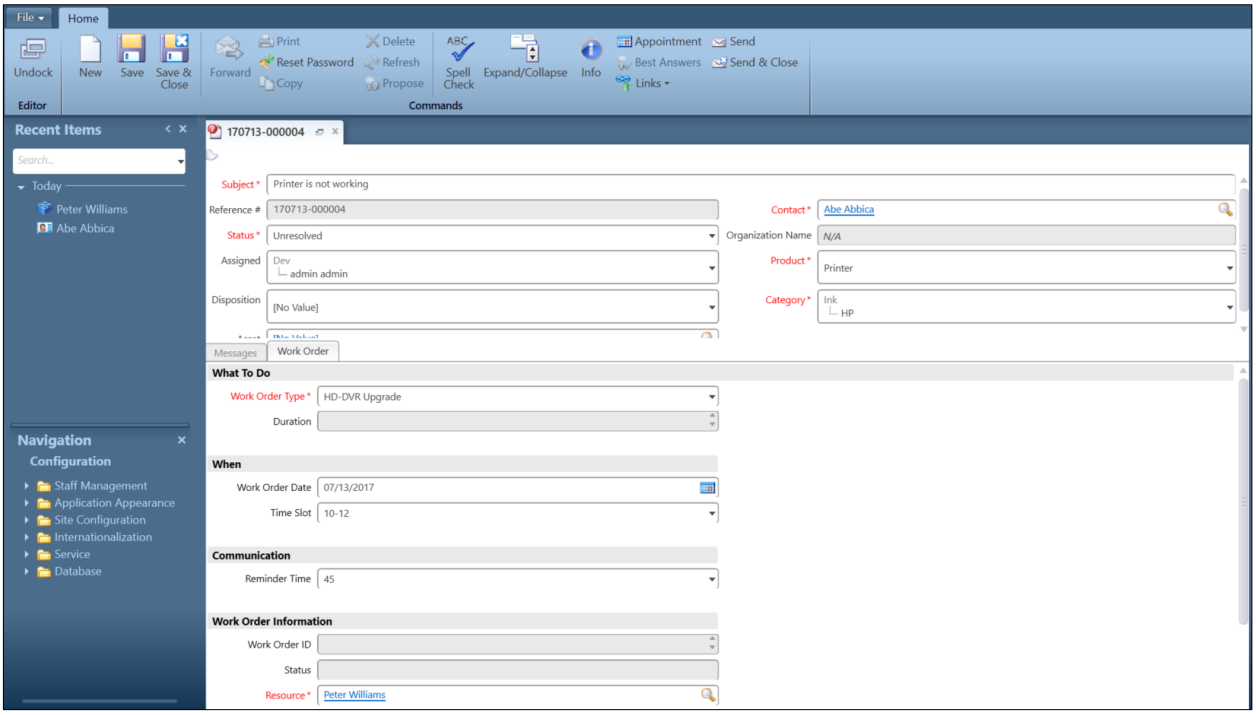
- Delete an incident that has a corresponding activity in OFSC
- The status of the activity should change to Cancelled

Demo Scenario Examples

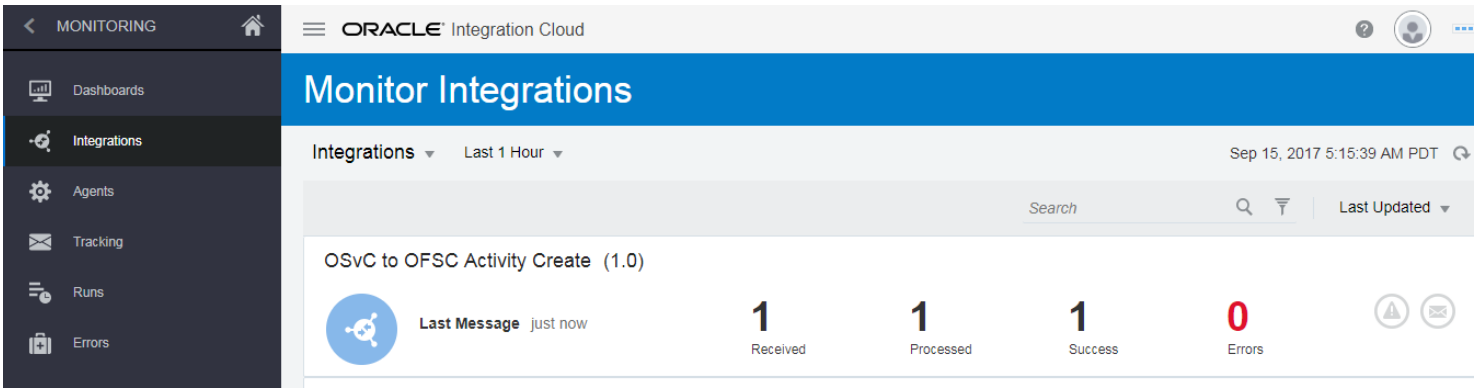
Creating an incident

Creating an incident in OSvC will create a corresponding activity in OFSC.

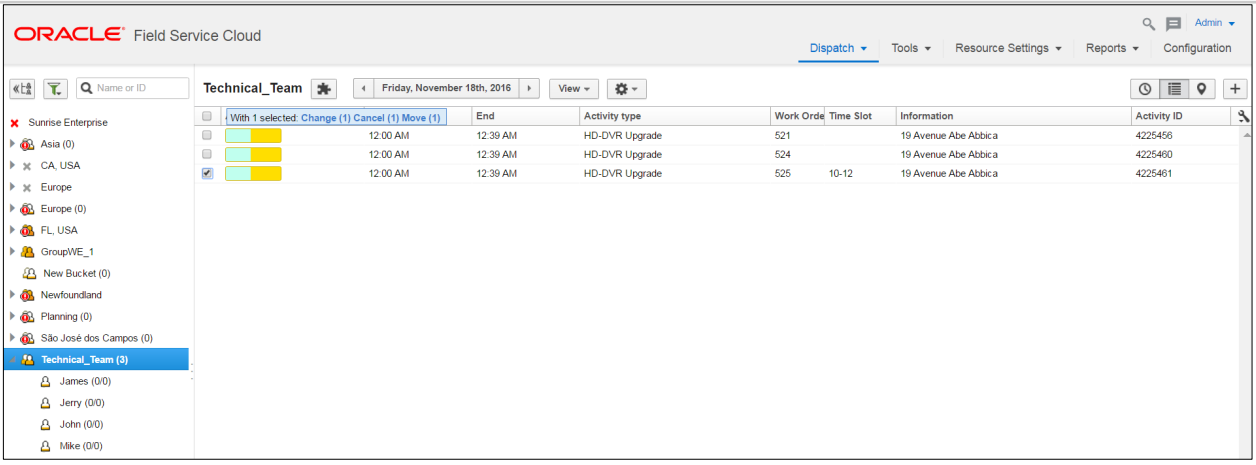
An incident with a work order is created in OSvC by the user.

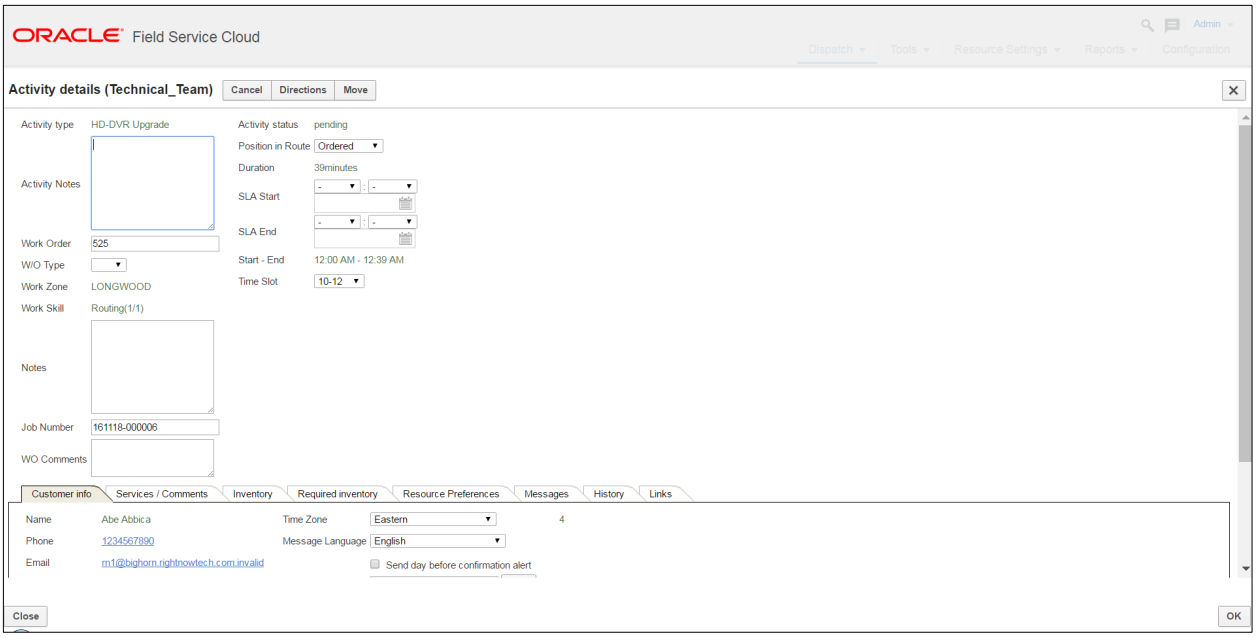


The event reaches ICS and is processed by the **OSvC to OFSC Activity Create** integration.



An activity is created in OFSC by the **OSvC to OFSC Activity Create** integration.

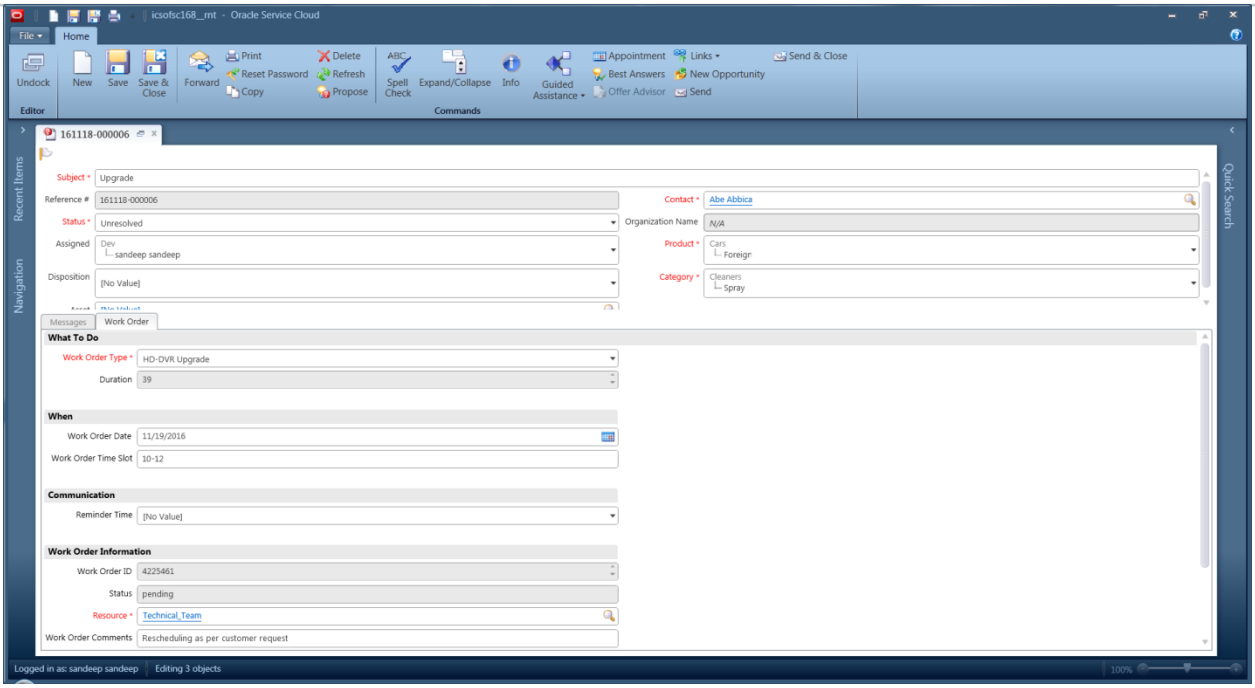




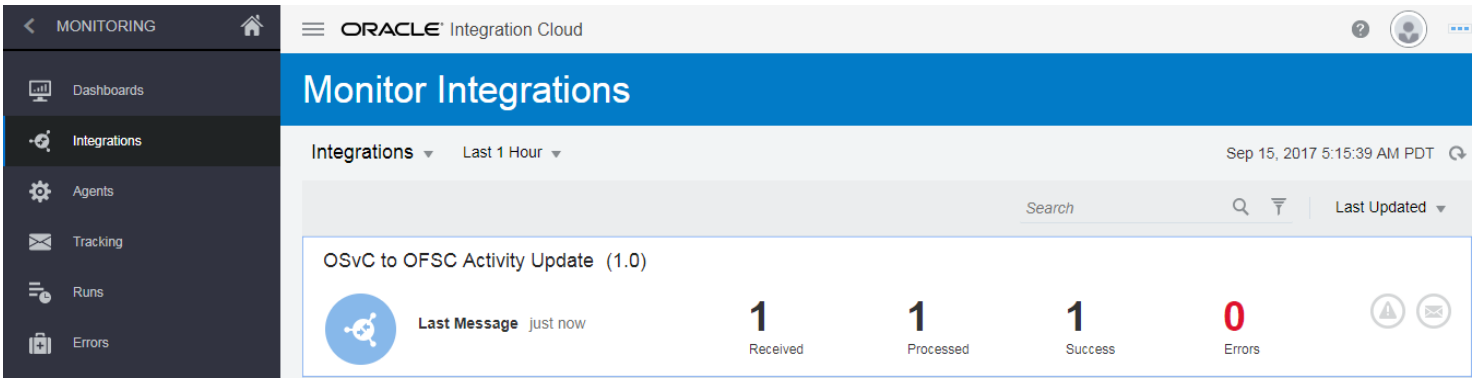
Modifying an incident

Any changes made to the incident (E.g. change in date) will be updated in the OFSC Activity.

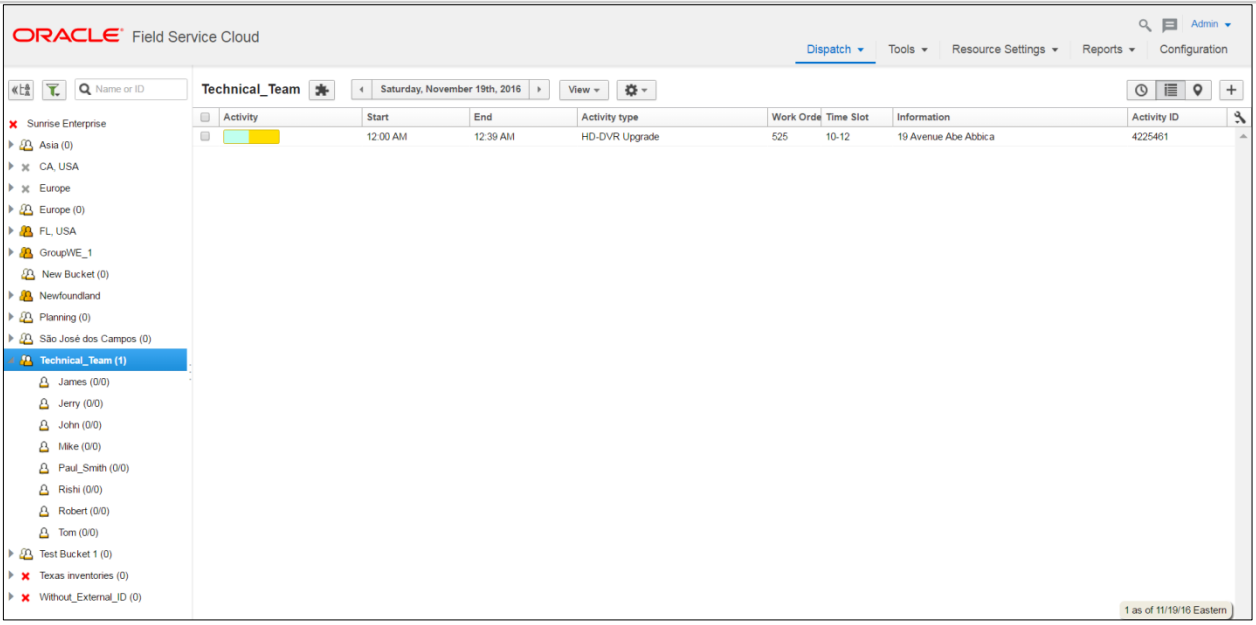
Activity is rescheduled (date changed) in OSvC by user.



The event reaches ICS and is processed by the **OSvC to OFSC Activity Update** integration.

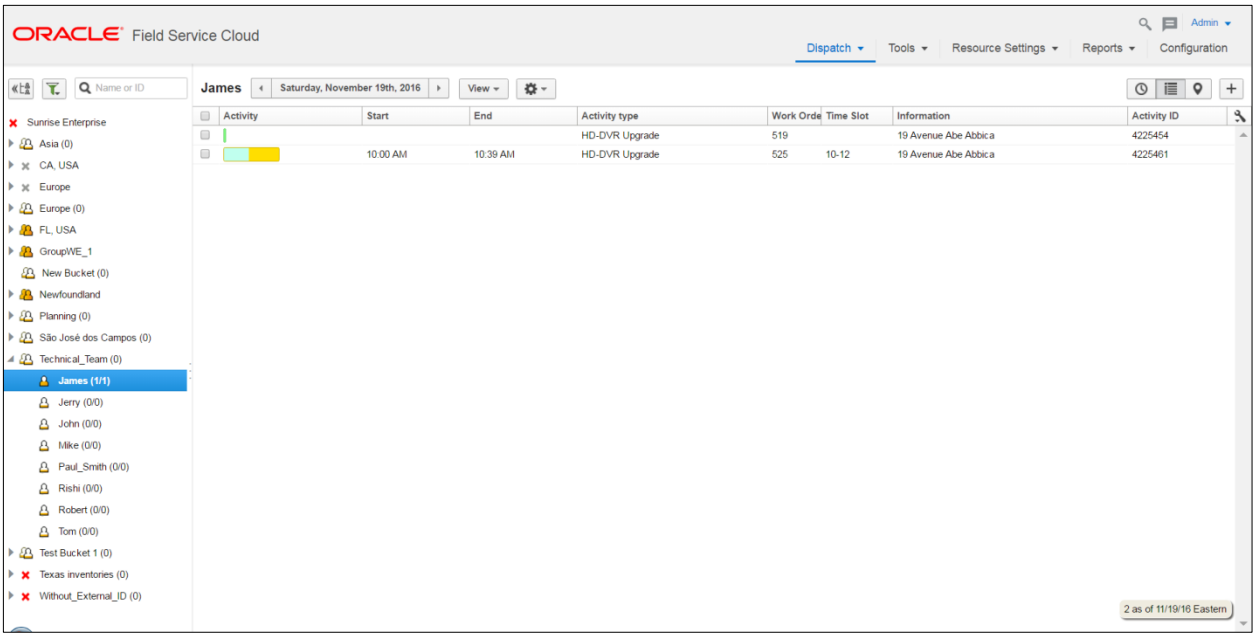


The corresponding Activity is rescheduled (date changed) in OFSC by the **OSvC to OFSC Activity Update** integration.

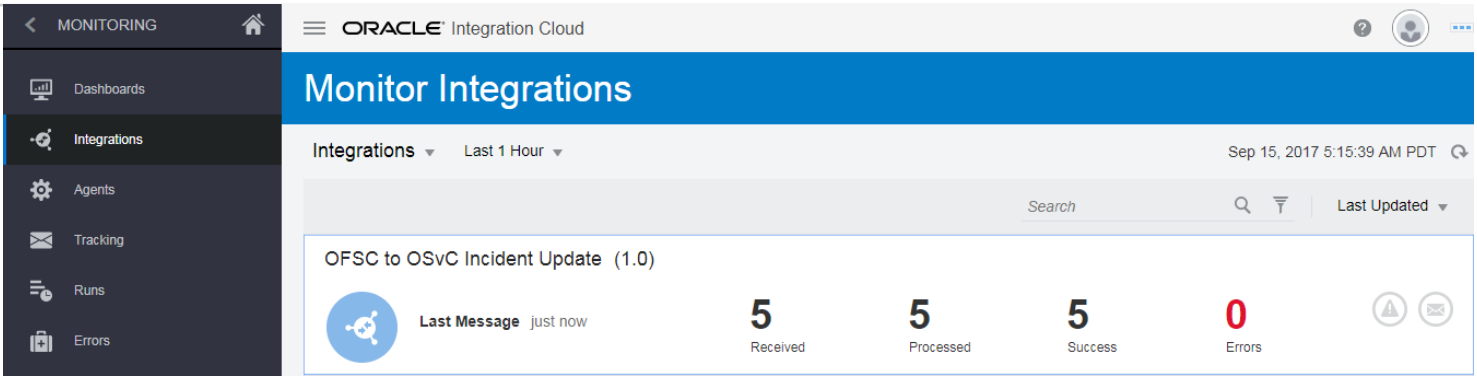


Modifying an activity

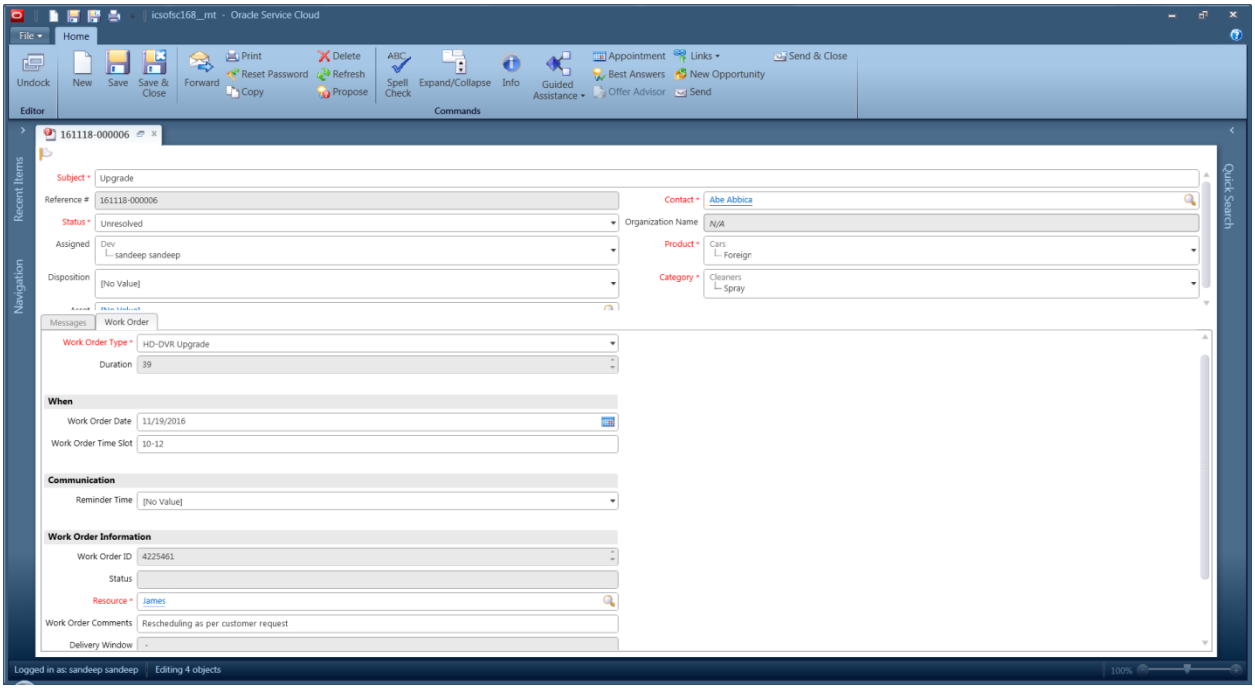
Any changes made to the OFSC Activity will modify the corresponding OSvC Incident accordingly. E.g. Activity is updated (assigned to a new resource) in OFSC by the user.



The event reaches ICS and is processed by the **OFSC to OSvC Incident Update** integration.



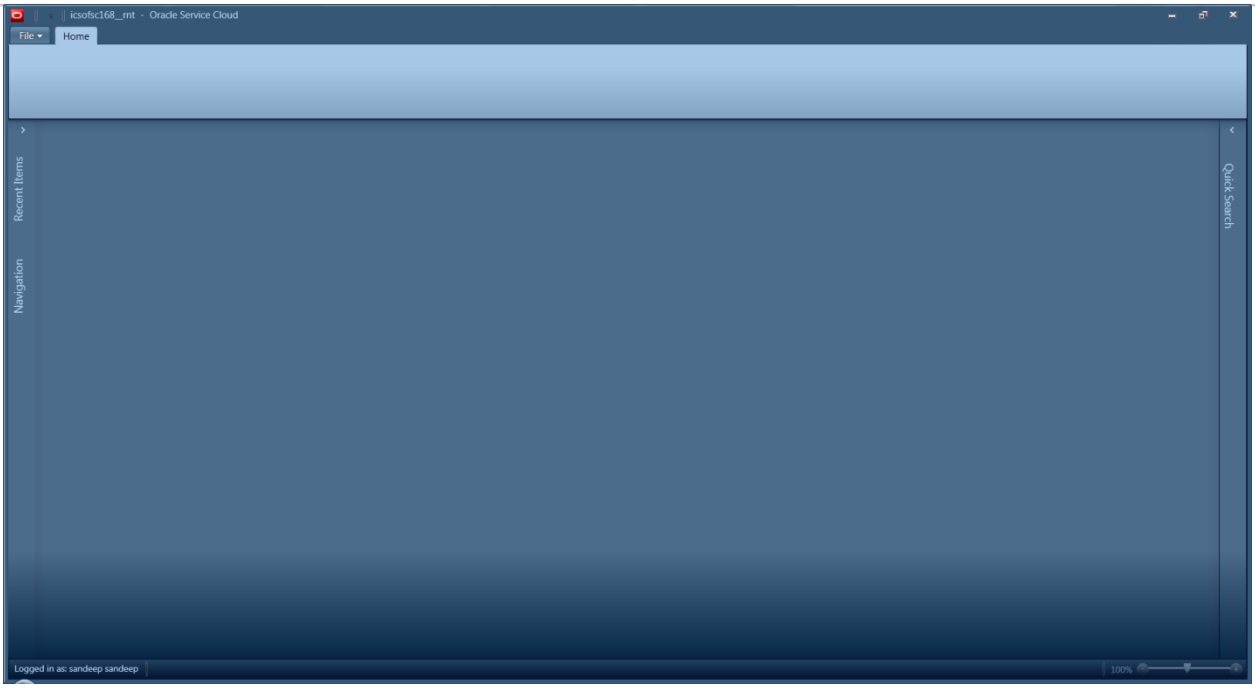
The Incident Work Order details are updated in OSvC by the **OFSC to OSvC Incident Update** integration.



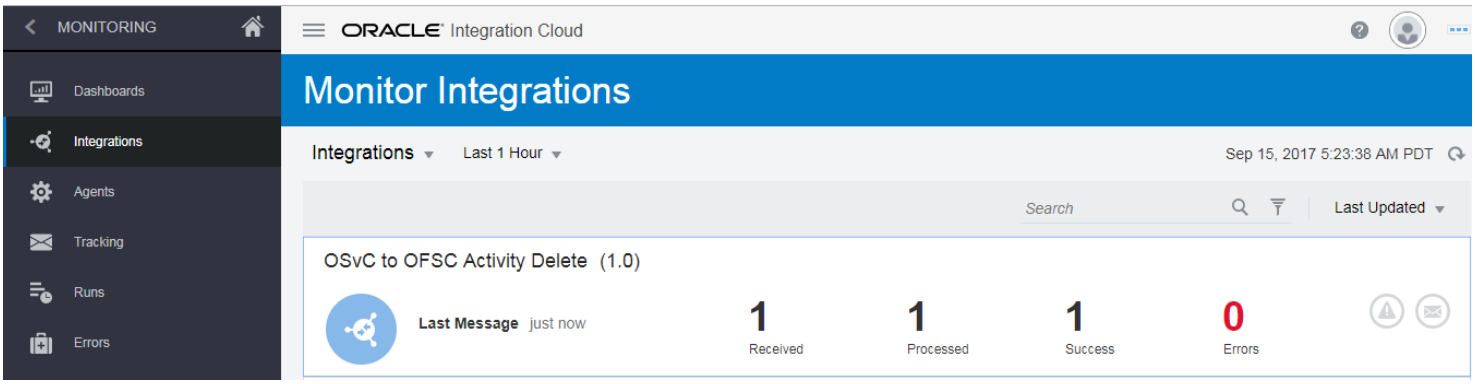
Deleting an incident

Whenever an incident is deleted in OSvC, the status of the corresponding activity changes to *Cancelled*.

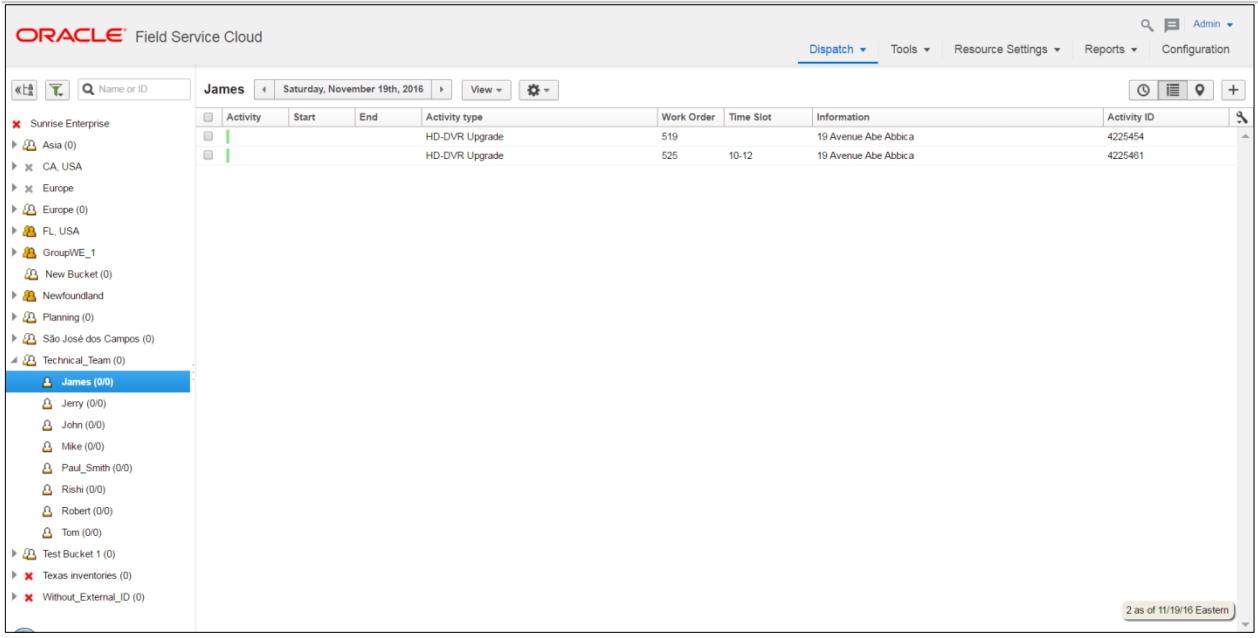
Incident is in Deleted in OSvC by user.

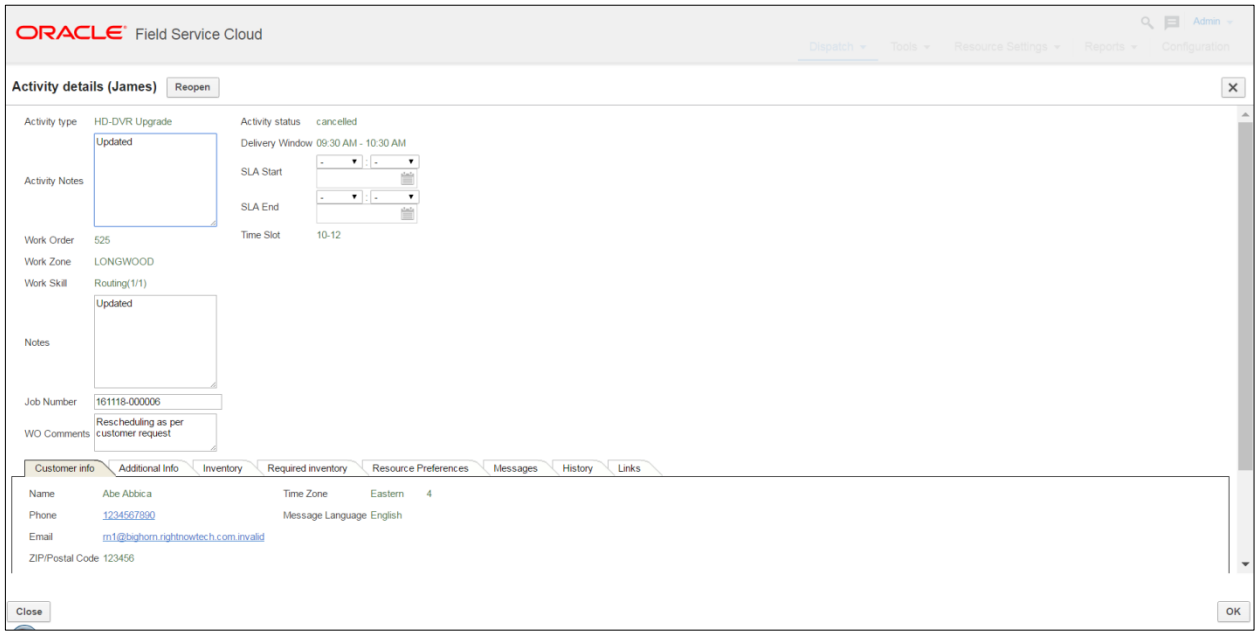


Event Reaches ICS and is processed by the **OSvC to OFSC Activity Delete** integration.



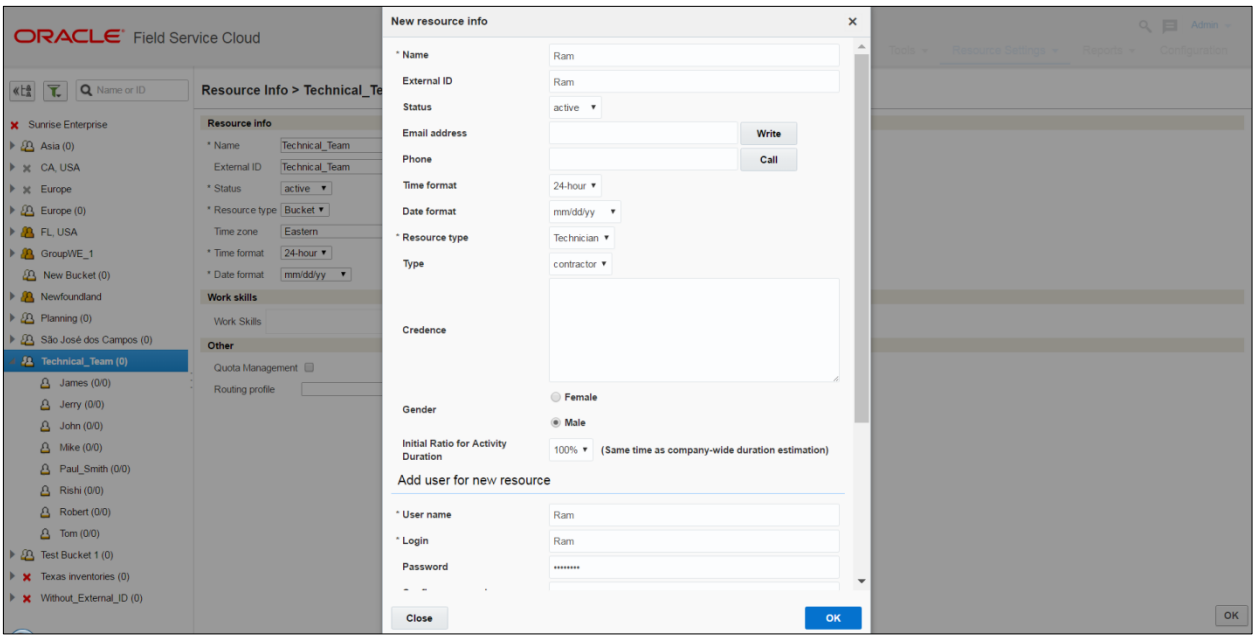
The corresponding Activity is cancelled in OFSC by the **OSvC to OFSC Activity Delete** integration.

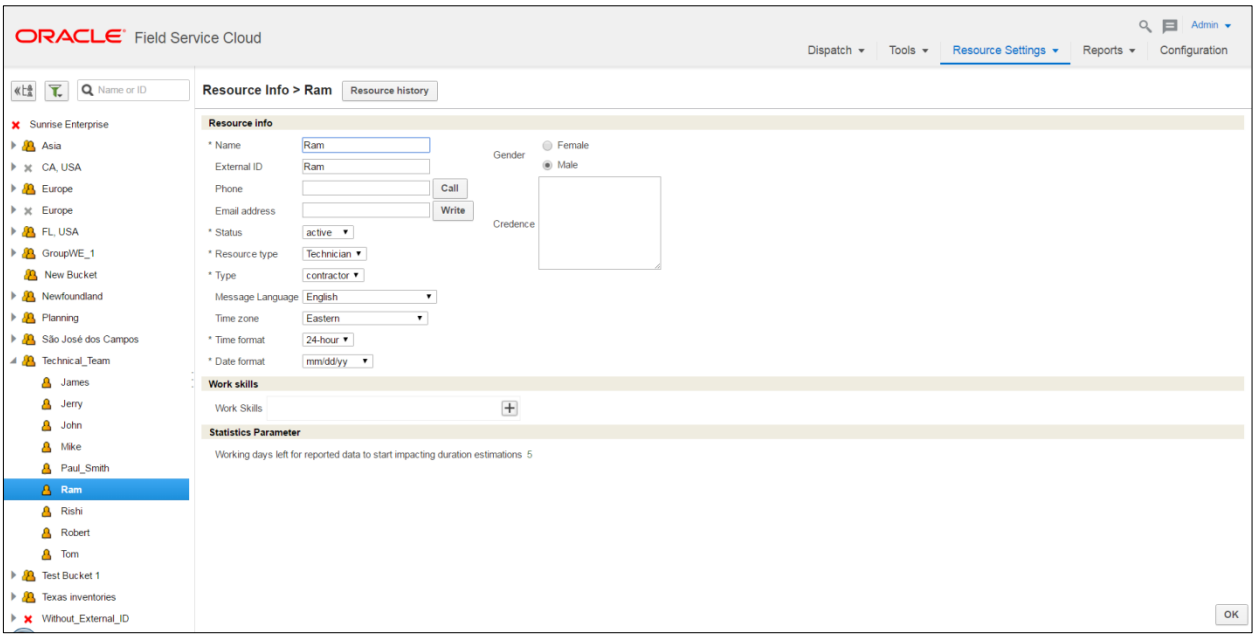

ORACLE Field Service Cloud
Admin
Dispatch
Tools
Resource Settings
Reports
Configuration
Name or ID
James
Saturday, November 19th, 2016
View
Activity
Start
End
Activity type
Work Order
Time Slot
Information
Activity ID
HD-DVR Upgrade 519 19 Avenue Abe Abbica 4225454
HD-DVR Upgrade 525 10-12 19 Avenue Abe Abbica 4225461
Sunrise Enterprise
Asia (0)
CA, USA
Europe
Europe (0)
FL, USA
GroupWE_1
New Bucket (0)
Newfoundland
Planning (0)
São José dos Campos (0)
Technical_Team (0)
James (0/0)
Jerry (0/0)
John (0/0)
Mike (0/0)
Paul_Smith (0/0)
Rishi (0/0)
Robert (0/0)
Tom (0/0)
Test Bucket 1 (0)
Texas inventories (0)
Without_External_ID (0)
2 as of 11/19/16 Eastern


ORACLE Field Service Cloud
Activity details (James)
Reopen
Activity type HD-DVR Upgrade
Activity status cancelled
Activity Notes Updated
Delivery Window 09:30 AM - 10:30 AM
SLA Start
SLA End
Work Order 525
Time Slot 10-12
Work Zone LONGWOOD
Work Skill Routing(1/1)
Notes Updated
Job Number 161118-000006
WO Comments Rescheduling as per customer request
Customer info
Additional Info
Inventory
Required inventory
Resource Preferences
Messages
History
Links
Name Abe Abbica
Time Zone Eastern 4
Phone 1234567890
Message Language English
Email rn1@bighorn.rightnowtech.com.invalid
ZIP/Postal Code 123456
Close
OK

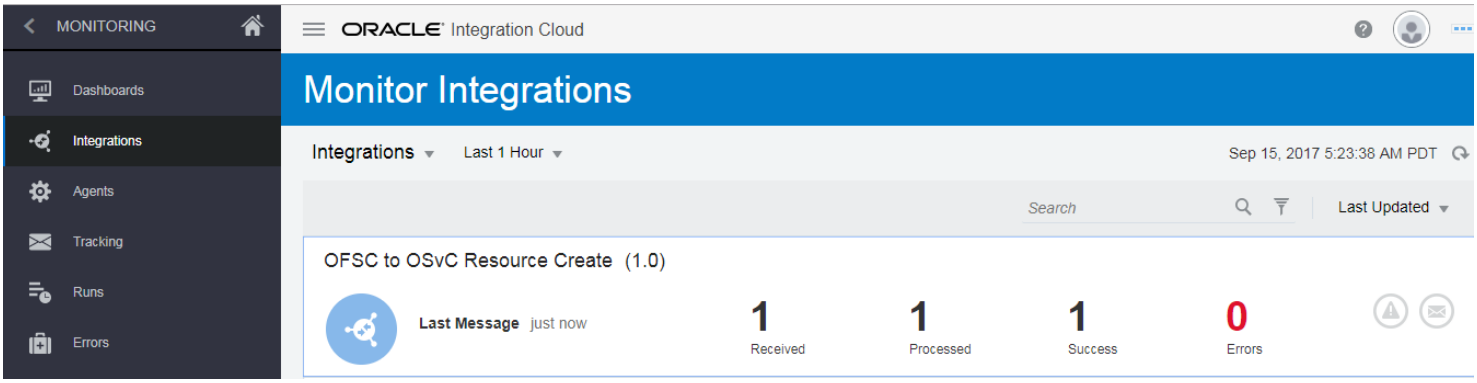
New resource creation

New resources created in OFSC will create corresponding resources in OSvC.

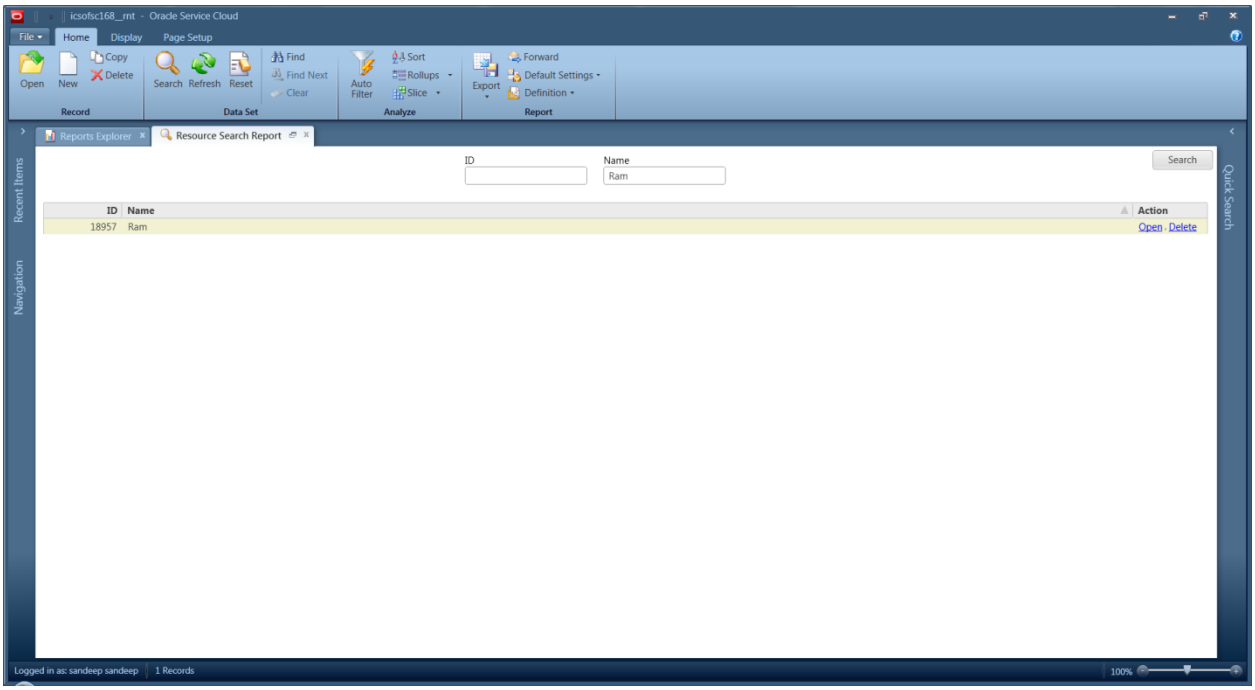




The event reaches ICS and is processed by the **OFSC to OSvC Resource Created** integration.



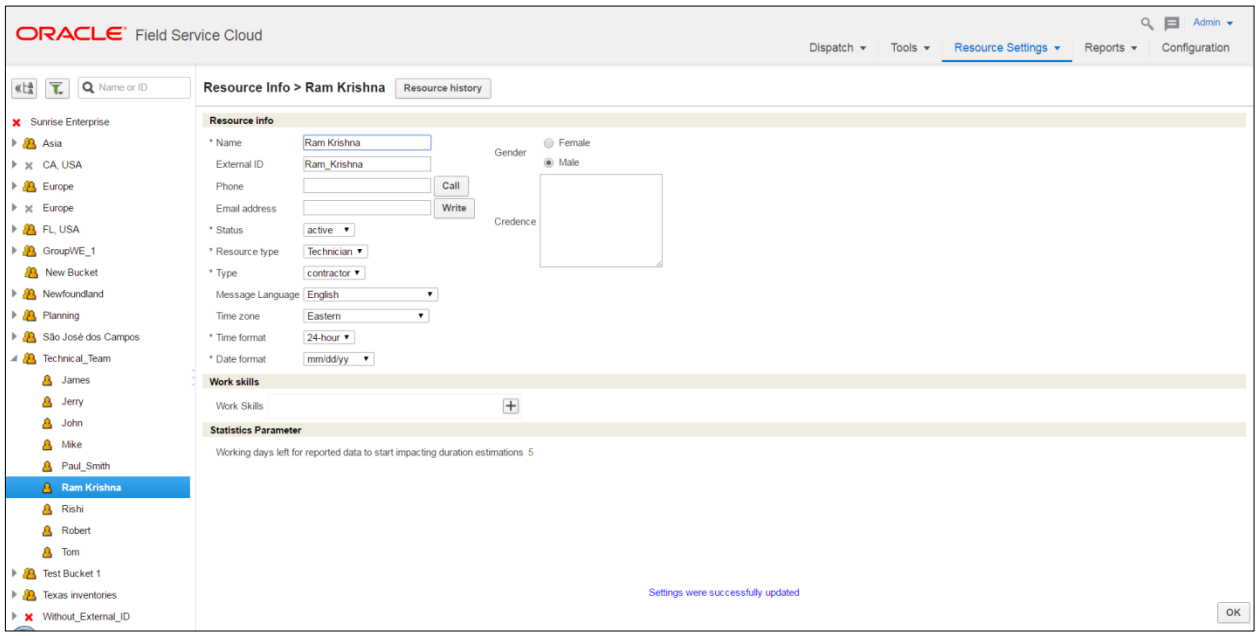
A new resource is created in OSvC by the **OFSC to OSvC Resource Created** integration.



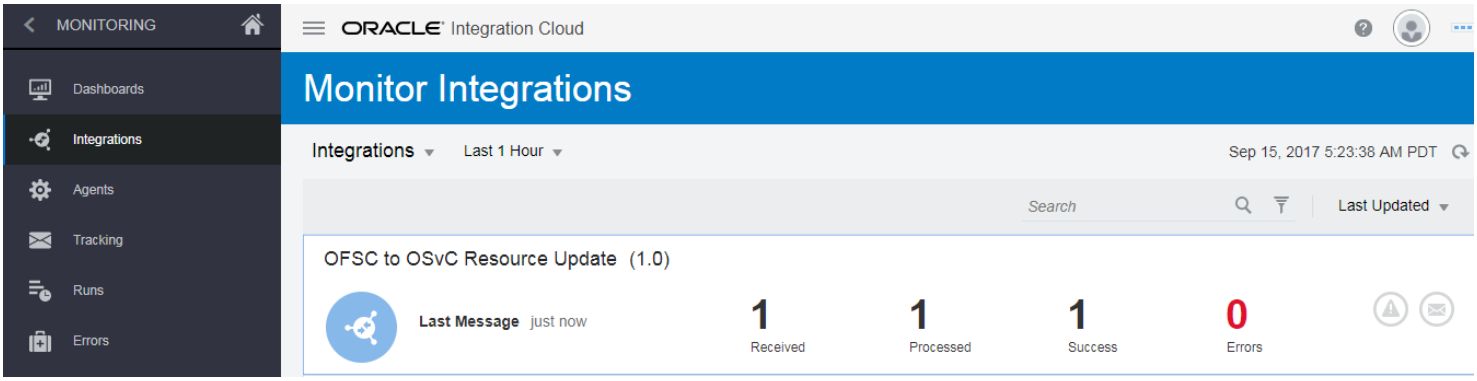
Updating a resource

Whenever the Resource Info is updated in OFSC, the same is also updated in OSvC.

Resource is updated in OFSC by user.



The event reaches ICS and is processed by the **OFSC to OSvC Resource Update** integration.



The corresponding Resource is updated in OSvC by the **OFSC to OSvC Resource Update** integration.