SAP® Cloud for Customer

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# **ELO Integration Service for SAP® Cloud for Customer**

# Introduction

This documentation describes how to set up the ELO Integration Service for SAP® Cloud for Customer. SAP® Cloud for Customer groups multiple functional levels. This integration works for SAP Sales Cloud as well as SAP Service Cloud.

The integration service provides the technical platform for implementing the ELO Integration Client in an SAP® Cloud for Customer system (referred to here simply as C4C). Following installation, the ELO Integration Client is available as a mashup in correspondingly configured objects in the C4C client. When the ELO Integration Client is called within C4C, a configurable path is created (assuming one doesn't already exist) and displayed in ELO. This provides the user with the functions of the ELO Integration Client, which can also be customized if required.

# **ELO** basics

To use the ELO Integration Service for SAP® Cloud for Customer and the ELO Integration Client within C4C, the systems must meet the following requirements:

- ELOprofessional or ELOenterprise version 12 or higher
- The following modules are required:
  - ELOwf
    - ELOwf 20.05.000
    - ELOwf 12.06.000
  - FLO REST
    - ELO REST Service 20.02.000
    - ELO REST API 12.04.000
  - ELO Business Solutions Common version 1.07.000 or higher
- Correctly set SameSite flag (see <u>ELO Integration Client</u> documentation)
- Installed and configured ELOauth plug-in (optional when using single sign-on)

In addition, your ELO license must include the ELO Integration Service for SAP® Cloud for Customer as well as user licenses for the ELO Integration Client.

# Mashup basics

A mashup is a website or application that integrates data or functionalities from two or more sources.

In this case, C4C is the data source and the ELO Integration Client delivers the additional functionality. Data in C4C is transferred to the ELO Integration Client using a proprietary implementation.

# **Configuration in ELO**

First, you need to install and configure the ELO Integration Service for SAP® Cloud for Customer in the ELO system.

You will find the necessary installation packages on the ELO SupportWeb under *Integration*. The ELO installation package contains the following files:

- crm.c4c.integrationservice
- crm.c4c.integrationservice.custom

The ELO Integration Client also requires a configuration file in ELOapps:

elo.integration.Client

# 'elo.integration.client' configuration file

The configuration file *elo.integration.client* in JSON format is required for the ELO Integration Client. You will find this configuration file under this path:

//Administration// ELOapps//Configuration//elo.integration.Client

If this file already exists, you will have to add the entry *c4c*.

If it does not yet exist, create it with the following parameters. This is important for calling the URL.

```
"c4c": {
 "noForm": false,
  "noFeed": false,
  "noFulltext": false,
  "noImagePreview": false,
  "rFInit": "RF_crm_c4c_integrationservice_service_Init",
  "newDocVersFct": true,
  "saveDocFct": true,
  "gotoFct": true,
  "webClientURL": " http(s)://<ELOSERVER>:<PORT>/ix-<REPOSITORY>/plugin/de.elo.ix.plugin.
  "editInOfficeFct": true.
  "removeEntryFct": true,
  "startWorkflowFct": false,
  "startWorkflowTemplates": null,
  "externalLinkFct": true,
  "folderMask": "<GUID of folder form>",
  "documentMask": "<GUID of document form>",
  "hasSearch": true,
```

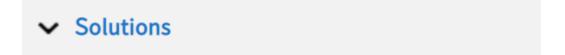
```
"referenceEntryFct": true,
    "refreshFct": true
}
```

For more information on this configuration file, refer to the **ELO Integration Client** manual.

Be sure to check the following important parameters when creating or modifying the file:

- rFInit: Function that creates the folder path in ELO; provided with the *crm.c4c.integrationservice* package.
- webClientURL: URL to open the ELO Web Client when the GoTo function is enabled. To prevent the user from having to log on multiple times, the proxy behind the ELO Indexserver must be configured. The ELO Web Client should be configured accordingly as a plug-in behind the ELOix proxy (recommended method).
- folderMask: Defines the metadata form that the ELO Integration Service uses to create new structures based on the C4C object.
- documentMask: Defines the metadata form that the ELO Integration Service uses when filing documents from the ELO Integration Client within C4C. You can use metadata forms that pass information onto the objects.

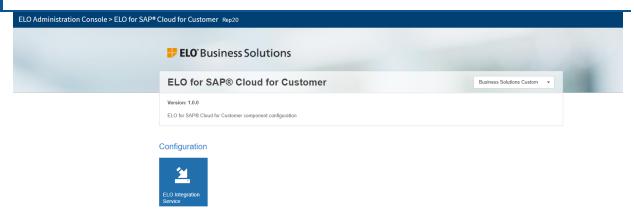
# **ELO Integration Service for SAP® Cloud for Customer configuration**





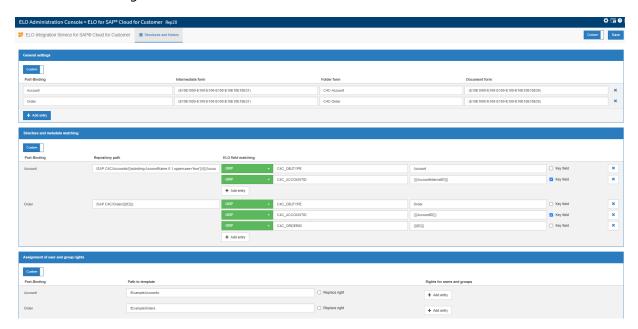
1. Once you have successfully installed the ELO packages, you will find the configuration app in the ELO Administration Console under:

Solutions > SAP® Cloud for Customer > ELO Integration Service



The ELO for SAP® Cloud for Customer page opens.

2. Click the ELO Integration Service tile.



The ELO Integration Service configuration interface opens.

# Optional:

You can make the following configurations in the interface:

- General settings
- Structure and metadata matching
- Assignment of user and group rights

# **General settings**

Under *General settings*, you can now create configurations for each C4C object. As soon as you add a new entry, corresponding lines are automatically created in the *Structures and metadata matching* area. Lines are also created in the *Assignment of user and group rights* area.



Port binding: In the *Port binding* column, enter the name of the object you are creating the configuration for. You can specify the name of the port binding object in the corresponding C4C mashup (See section URL mashup).

Intermediate form: In the *Intermediate form* column, enter the metadata form for folders that may have to be created on storage so that the specified path can be generated.

Folder form: The final metadata form is specified in the Folder form column, e,g. C4C Folder.

Document form: This is where you specify which metadata form to use when filing from C4C. You can enter the same form as in the ELO Integration Client configuration file, or a separate one for each C4C object.

# Structure and metadata matching

As described in the section <u>General settings</u>, when you create an entry under <u>General settings</u>, a separate entry for the port binding is automatically created in the <u>Structure and metadata matching</u> area.



Port binding: This entry is copied directly from the *Port binding* column under *General settings* and can also only be modified in this area.

Repository path: The filing path in ELO is defined in the *Repository path* column. In this field, you can also enter C4C variables, e.g. using Handlebars syntax. You can find an example in the section HTML mashup.

ELO field matching: Choose between GRP for metadata field and MAP for map fields.



ELO field: In MAP fields, it is possible to use iteration by attaching the value {i} to the technical name.

#### Please note

If the metadata fields do not exist in the metadata form, the corresponding values will be lost and written as a warning in the log. This means they cannot be imported or matched.

Value in Handlebars: The value entered here is stored in the corresponding ELO field in the ELO entry. To copy the value of the transfer parameter from the URL, it must be enclosed in triple curly brackets.

If the values are iterated, you can use the {i} identifier to indicate the Handlebar.

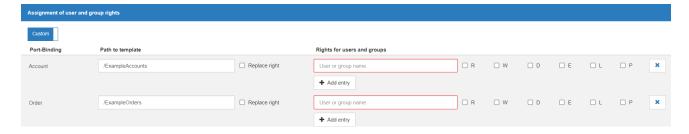
#### Please note

If an iteration is defined but there is no  $\{i\}$  in the ELO field, all values will be concatenated in this field up to a maximum of 255 characters. Any values above this will be rejected.

Key field: You can select one key field. The value of the key field is used to specify a property of the object that remains a unique identifier even when other data changes. For example, you can specify an ID that uniquely identifies an object. This ensures that an object is not created twice (with a new name) in the repository, for example. Instead, the corresponding folder is found and a new path is created according to the new name. The folder and its contents are moved to this new path. The documents that were stored under the old name remain in the folder with the new name.

#### Assignment of user and group rights

This is where you assign user and group rights.



Replace rights: ELO inherits the rights of the folder by default. If this option is enabled, the rights of the folder are discarded and only the set rights are assigned.

Rights for users and groups: Enter the users or groups that you want to assign rights to here.

RWDELP: Use the check boxes to set the different permissions types for users or groups.

- R = View
- W = Change metadata
- D = Delete
- E = Edit
- L = Edit list
- P = Set permissions

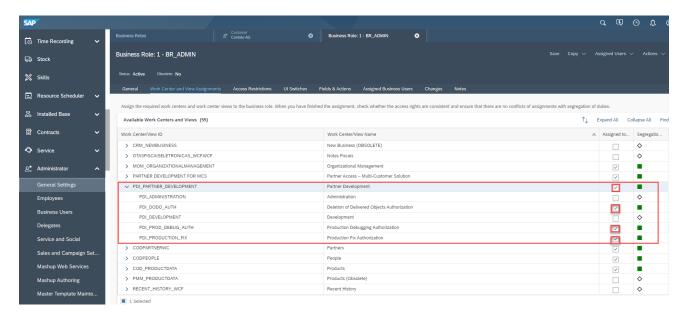
For more information, refer to the documentation <u>Concept for assigning rights and permissions</u>.

# Integration with SAP® Cloud for Customer

SAP® Cloud for Customer is an SAP CRM product that combines the two SAP customer experience solutions SAP Sales Cloud and SAP Service Cloud in one package. It runs on the SAP® HANA Cloud Platform and was developed with a mobile-first approach to meet the current needs of sales and service users.

ELO Digital Office GmbH does not act in a consulting capacity on SAP® Cloud for Customer, which is why this documentation only addresses the integration of the ELO Integration Client.

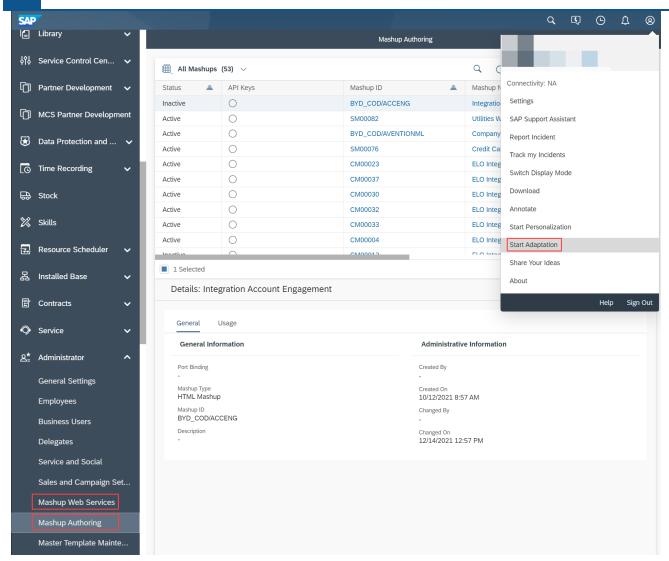
# **User roles/Views**



You should first check whether you have the required permissions to integrate and configure mashups.

#### Please note

The views *PDI\_DEVELOPMENT* and *PDI\_ADMINISTRATION* must not be assigned, as you will otherwise not have access to the mashup integration functions.



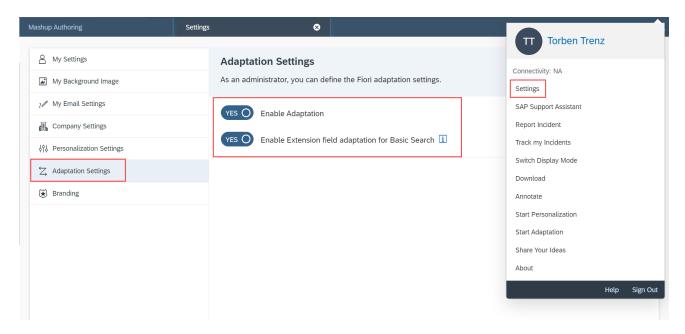
After you log on again, the following entries should be available under *Administration* > *General Settings*:

- · Mashup Web Services
- Mashup Authoring

The following entries should be available under your user profile:

· Start Adaptation

# **Enable adaptation settings**



Before you can integrate mashups, the function needs to be activated using an administrator account.

You will find these settings under your *user profile* > *Settings* > *Adaption Settings*.

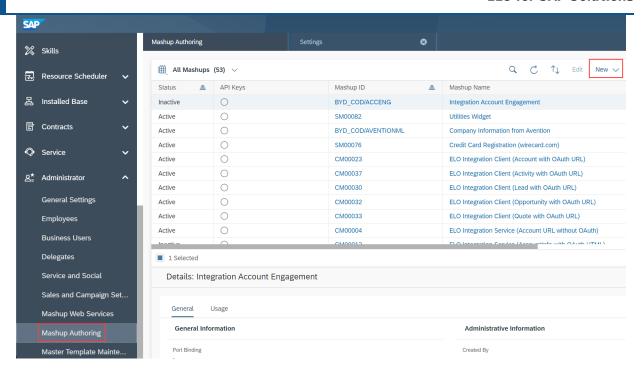
# **Please note**

If these settings are switched off, you won't be able to adapt the C4C settings or connect the ELO Integration Client.

# Create the mashup application

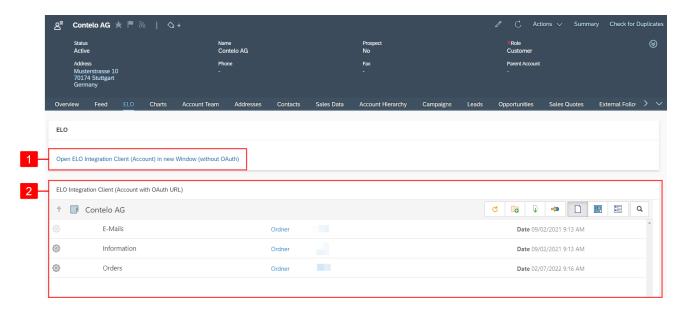
1. To create a C4C mashup, navigate to the following menu entry:

Administrator > General Settings > Mashup Authoring



- 2. Select the function New.
- 3. You can choose between two mashup types to connect the ELO Integration Client.
  - URL Mashup: A mashup that sends data from the SAP cloud solution to the URL of an online service provider. The service provider uses the data to perform a search, for example. The results are displayed in a new browser window.
  - HTML Mashup: A mashup that embeds an HTML or JavaScript browser page directly on a screen.

# **URL and HTML mashup examples**



1 URL mashup: Only a URL is displayed. The ELO Integration Client opens in a separate window.

2 HTML mashup: The ELO Integration Client is embedded in the application and opens directly in the view.

# Set up the mashup

This section explains how a mashup can be created, which configuration steps are required, and how it is subsequently linked to a C4C object.

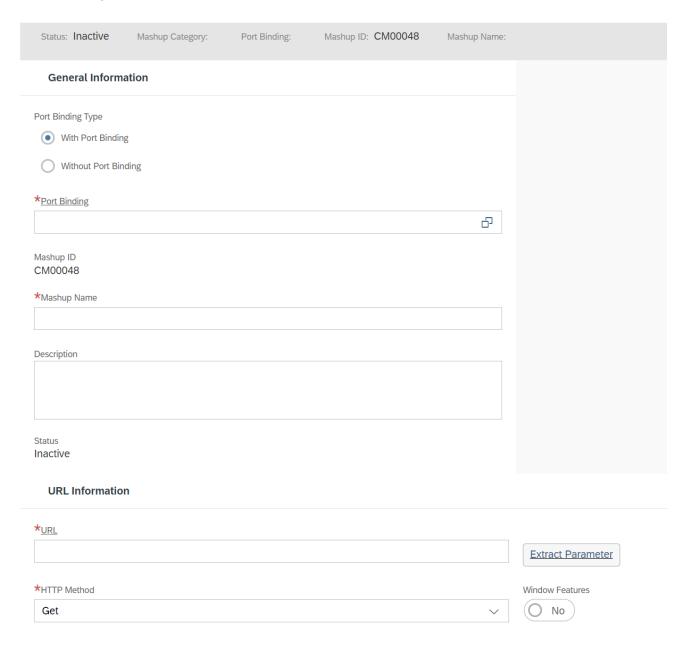
The implementation example here was done with a <u>URL mashup</u> as well as an <u>HTML mashup</u>.

# **Information**

Both the URL mashup and the HTML mashup can be configured to enable single sign-on. To use single sign-on, the URL to the ELOauth plug-in has to be entered instead of the ELO Integration Client URL. See also the section Single sign-on via ELOauth plug-in.

The following example illustrates implementation without single-sign on.

# **URL** mashup



1. Select a port binding type.

# Information

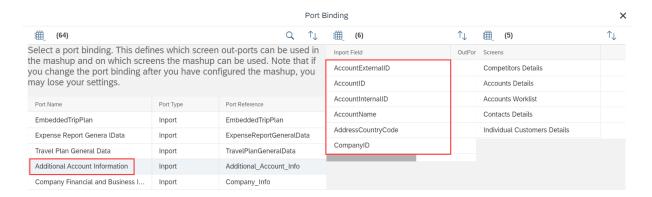
The port binding type specifies which object data can be accessed in C4C. Not every object provides a port binding.

2. Click the icon in the *Port Binding* text field.

The Port Binding menu opens.

#### Information

The port binding options ensure that information from the C4C application is forwarded to the respective mashup. In turn, the mashup can work with data from the C4C application.



In the example, a mashup is created for the metadata form *Customer (Account)*.

In this case, the import fields you see in the screenshot will be provided to the C4C application.

#### **Information**

If the field you require is not in the list, you are unable to import or export the data.

- 3. Complete the mandatory fields in the *General Information* menu.
  - Mashup Name: Specify a name for the mashup.
  - URL:

http(s)://<ELOSERVER>:<PORT>/ix-<REPOSITORY>/plugin/de.elo.ix.plugin.proxy/wf/ap

Extract parameters: Reads the parameters of the passed URL and displays them in the request parameter.



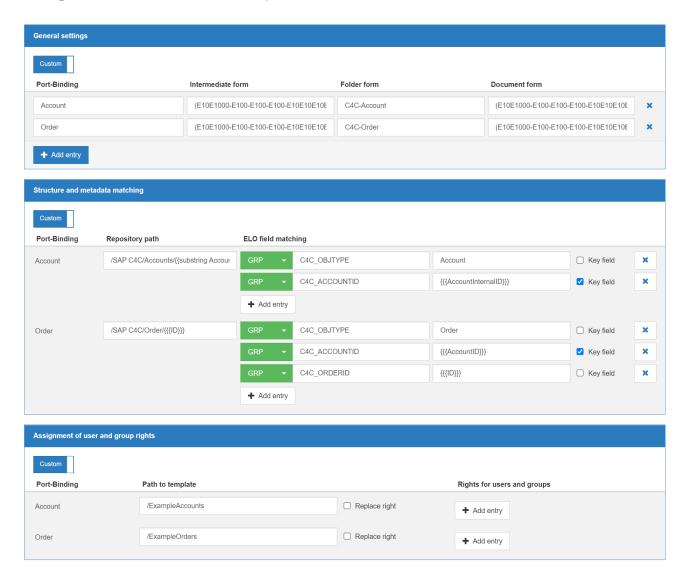
 Request parameter: This is where the port binding data is mapped to the URL parameters. In this case, the parameters debug, system, and <code>ObjType</code> are fixed constants. C4C dynamically passes the parameter <code>AccountName</code>, which contains the respective customer name in the <code>AccountName</code> parameter binding.

4. Click Activate.

#### **HTML** mashup

You can also create an HTML mashup of the type URL. The settings and restrictions correspond to those described in the URL mashup section.

# Configuration based on the example 'Account'

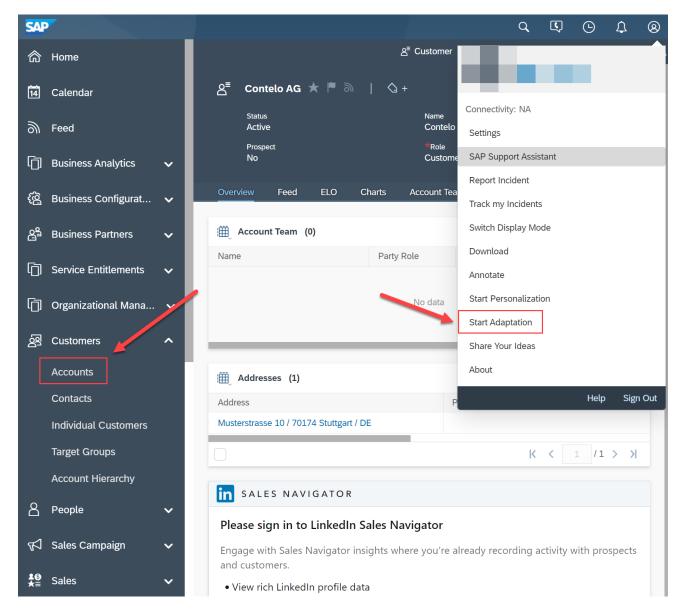


# Display the mashup

Now that the mashup is configured, it needs to be displayed on the screen.

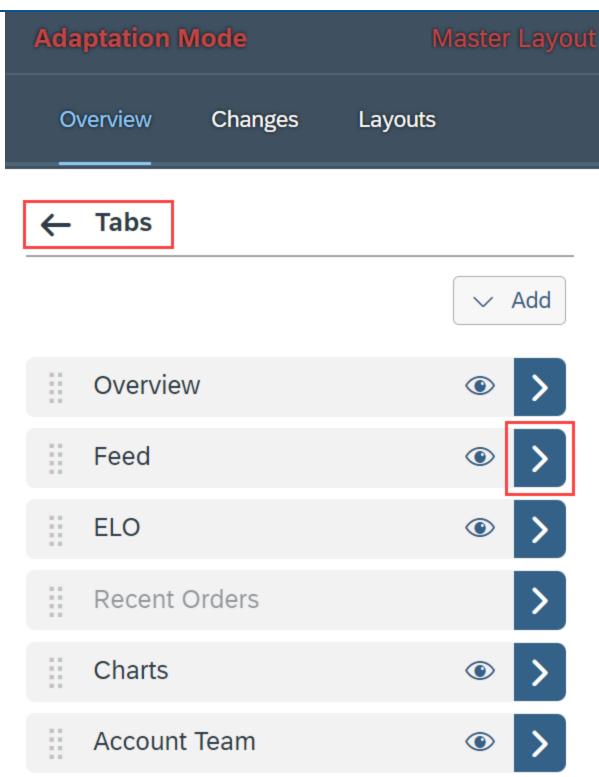
Navigate to the corresponding object that you want to integrate the mashup into.

This is demonstrated in the following example for the object *Customer (Account)*.



- 1. Select a customer object.
- 2. Click the icon for your profile.
- 3. Select the entry Start Adaptation.

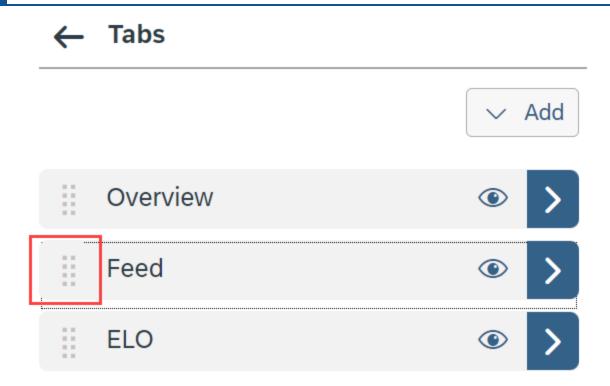
You have the option to connect the ELO Integration Client with an existing tab or your own tab.



4. If you want to use an existing tab, click the blue button next to the tab.

# Alternative:

To create a new tab specifically for your mashup, select Add.

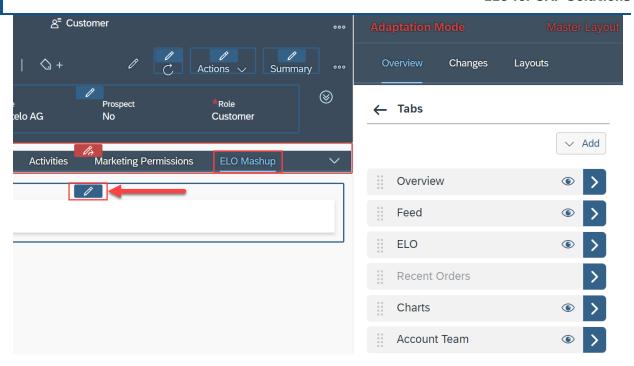


You can rearrange the tab order with drag and drop.



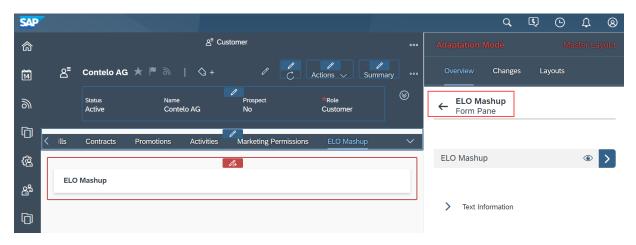


Next, you can enter a name for the new tab.



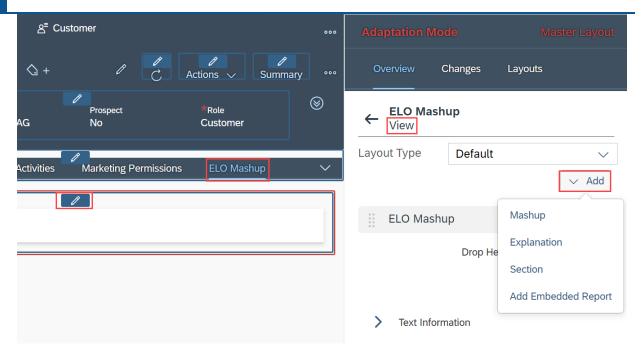
5. Navigate to the new tab and click the pen icon.

The view on the right-hand side changes to the Form Pane page.



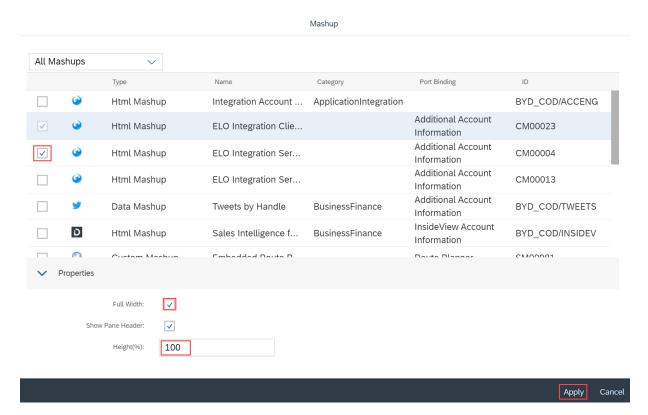
6. Click twice on the arrow icon to the left of *ELO Mashup – Form Pane*.

The View page opens.

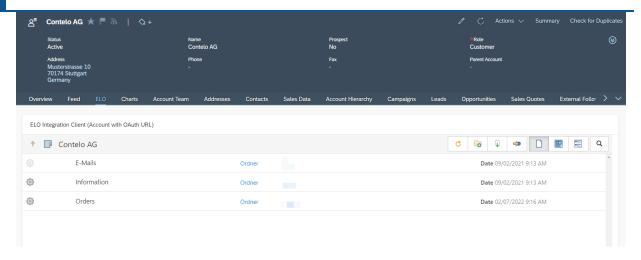


# 7. Click Add.

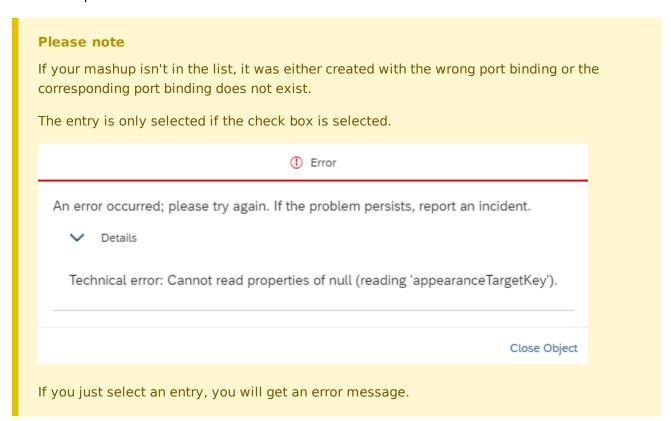
You see all mashups that you can use for the object.



- 8. Select the mashup you want.
- 9. Click Apply to confirm.



The mashup is now available.



# Single sign-on via ELOauth plug-in

If you authenticate with your C4C via SAML authentication, you can also use it for authenticating with the ELO Integration Client.

In this case, you have to install the ELOauth plug-in and configure it accordingly. You can download the ELOauth plug-in on the ELO SupportWeb. The installation process is described in <u>ELOauth plug-in: configuration</u>.

**Please note** 

Only the required ELO settings are shown here. SAML authentication must already be configured in C4C.

The plug-in is configured using a JSON file named *de.elo.ix.plugin.auth.json* located in the ELO Indexserver configuration directory:

```
<ELO-Inst>/config/ix-<repository>/<server name>
```

Add the following entry to the ELOauth plug-in configuration file and store your required values.

```
"aspings: "mail",
"asalUserAttribute": "mail",
"elientEi": "
"asalUserAttribute": "https://agrangfan.accounts.ondemand.com",
"clientEi": "https://agrangfan.accounts.ondemand.com",
"colledgin.samil.idp.single.jogn on_service.vir": "https://agrangfan.accounts.ondemand.com",
"colledgin.samil.idp.single.jogut.servic.usi": "https://agrangfan.accounts.ondemand.com",
"colledgin.samil.idp.single.logout.servic.usi": "https://agrangfan.accounts.ondemand.com",
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"colledgin.samil.idp.single.logout.servic.usi": "https://accuti.org/2001/04/smidsig=morefra=shalls",
"colledgin.samil.security.logoutresponse.signed": true,
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"colledgin.samil.security.usin_assertions.signed: true,
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"colledgin.samil.security.usin_assertions.signed: true,
"colledgin.samil.security.usin_assertions.signed: true,
"colledgin.samil.security.usin_assertions.signed:
```

Replace the URL entry for the ELO Integration Client within the mashup with the ELOauth plug-in URL.

Example structure:

```
http://<ELOSERVER>:<PORT>/ix-<REPOSITORY>/plugin/de.elo.ix.plugin.auth/login/?configId=<id>
```

<id> stands for the ID/name of the configuration entry.