Oracle® Cloud

Using the Oracle Field Service Adapter

16.3

E70361-03

August 2016

This guide describes how to configure and add the Oracle Field Service Adapter to an integration in Oracle Integration Cloud Service.



Oracle Cloud Using the Oracle Field Service Adapter, 16.3

E70361-03

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- Creating Mappings and Lookups in Integrations
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Preface

Using Oracle Field Service Adapter describes how to configure the Oracle Field Service Adapter as a connection in an integration in Oracle Integration Cloud Service.

Topics:

- Audience
- Related Resources
- Conventions

Audience

Using Oracle Field Service Adapter is intended for developers who want to use the Oracle Field Service Adapter in integrations in Oracle Integration Cloud Service.

Related Resources

For more information, see these Oracle resources:

· Oracle Cloud

http://cloud.oracle.com

- Using Oracle Integration Cloud Service
- Using the Oracle Mapper
- Getting Started with Oracle Cloud
- Managing and Monitoring Oracle Cloud

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.

Convention	Meaning
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Getting Started with the Oracle Field Service Adapter

Review the following conceptual topics to learn about the Oracle Field Service Adapter and how to use it as a connection in integrations in Oracle Integration Cloud Service. A typical workflow of adapter and integration tasks is also provided.

Topics

- About the Oracle Field Service Adapter
- About Oracle Integration Cloud Service
- About Oracle Integration Cloud Service Connections
- About Oracle Integration Cloud Service Integrations
- About Oracle Field Service Adapter Use Cases
- Typical Workflow for Creating and Including an Adapter Connection in an Integration

About the Oracle Field Service Adapter

Use the Oracle Field Service Adapter to create a Field Service application integration.

The Oracle Field Service Adapter provides service agents with access to the information they need to be successful in the field, connects field agents with on premise teams, and reduces the time to correct issues by getting the right person to the right place at the right time. The Oracle Field Service Adapter supports bidirectional data transfers; field service orders (outbound) are sent and progress updates (inbound) are received.

The Oracle Field Service Adapter provides these benefits:

- Acts as a single management interface for Oracle Field Service Cloud Service.
- Integrates Oracle Field Service Cloud Service with other cloud applications.
- Allows customized operations to meet the unique requirements of your organization.
- Provides tools for error reporting and review.
- Provides a standard adapter life cycle, controlled runtime environment, and monitoring capabilities.

The Oracle Field Service Adapter is one of many predefined adapters included with Oracle Integration Cloud Service. You can configure Oracle Field Service Adapter as a connection in an integration in Oracle Integration Cloud Service. For information

about Oracle Integration Cloud Service, connections, and integrations, see the following sections:

- About Oracle Integration Cloud Service
- About Oracle Integration Cloud Service Connections
- About Oracle Integration Cloud Service Integrations

What Application Version Does the Oracle Field Service Adapter Support?

The Oracle Field Service Adapter is compatible with version 16.2 of Oracle Field Service Cloud Service.

About Oracle Integration Cloud Service

Oracle Integration Cloud Service is a complete, secure, but lightweight integration solution that enables you to connect your applications in the cloud. It simplifies connectivity between your applications, and can connect both your applications that live in the cloud and your applications that still live on premises. Oracle Integration Cloud Service provides secure, enterprise-grade connectivity regardless of the applications you are connecting or where they reside.

Oracle Integration Cloud Service provides native connectivity to Oracle Software as a Service (SaaS) applications, such as Oracle Sales Cloud, Oracle RightNow Cloud, and so on. Oracle Integration Cloud Service *adapters* simplify connectivity by handling the underlying complexities of connecting to applications using industry-wide best practices. You only need to create a *connection* that provides minimal connectivity information for each system. Oracle Integration Cloud Service *lookups* map the different codes or terms used by the applications you are integrating to describe similar items (such as country or gender codes). Finally, the visual data mapper enables you to quickly create direct mappings between the trigger and invoke data structures. From the mapper, you can also access lookup tables and use standard XPath functions to map data between your applications.

Once you integrate your applications and activate the integrations to the runtime environment, the dashboard displays information about the running integrations so you can monitor the status and processing statistics for each integration. The dashboard measures and tracks the performance of your transactions by capturing and reporting key information, such as throughput, the number of messages processed successfully, and the number of messages that failed processing. You can also manage business identifiers that track fields in messages and manage errors by integrations, connections, or specific integration instances.

About Oracle Integration Cloud Service Connections

Connections define information about the instances of each predefined configuration you are integrating. Oracle Integration Cloud Service includes a set of predefined *adapters*, which are the types of applications on which you can base your connections, such as Oracle Sales Cloud, Oracle Eloqua Cloud, Oracle RightNow Cloud, and others. A connection is based on an adapter. A connection includes the additional information required by the adapter to communicate with a specific instance of an application (this can be referred to as metadata or as connection details). For example, to create a connection to a specific RightNow Cloud application instance, you must select the Oracle RightNow adapter and then specify the WSDL URL, security policy, and security credentials to connect to it.

(b) Video

About Oracle Integration Cloud Service Integrations

Integrations are the main ingredient of Oracle Integration Cloud Service. An integration includes at the least a trigger (source) connection (for requests sent to Oracle Integration Cloud Service) and invoke (target) connection (for requests sent from Oracle Integration Cloud Service to the target) and the field mapping between those two connections.

When you create your integrations, you build on the connections you already created by defining how to process the data for the trigger (source) and invoke (target) connections. This can include defining the type of operations to perform on the data, the business objects and fields against which to perform those operations, required schemas, and so on. To make this easier, the most complex configuration tasks are handled by Oracle Integration Cloud Service. Once your trigger (source) and invoke (target) connections are configured, the mappers between the two are enabled so you can define how the information is transferred between the trigger (source) and invoke (target) data structures for both the request and response messages.

Wideo

About Oracle Field Service Adapter Use Cases

This scenario describes the interaction between the Oracle Field Service Cloud Service and an application that receives and processes alerts for municipal services.

- A municipal employee receives an alert on the municipal services monitoring application indicating that there is a natural gas leak near a busy downtown intersection.
- The municipal employee creates a work order to dispatch a service team to the site. All details necessary to locate the natural gas leak are included in the work order.
- The municipal employee saves and submits the work order on the municipal services monitoring application.
- The work order is sent to the Oracle Field Service Adapter.
- The Oracle Field Service Adapter creates a matching activity in Oracle Field Service Cloud Service and returns the activity identifier to the municipal services monitoring application to allow the progress of the work order to be monitored.
- Oracle Field Service Cloud Service assigns the activity to the service team.
- The lead Engineer for the service team uses the mobile Oracle Field Service Cloud Service application to review the work order and identify the location of the natural gas leak.
- The service team repairs the natural gas leak and the lead Engineer uses the mobile Oracle Field Service Cloud Service application to change the status of the work order to completed.
- Oracle Field Service Cloud Service sends an activity completed notice for the work order to Oracle Field Service Adapter.
- The Oracle Field Service Adapter forwards the activity completed notice for the work order to the municipal services monitoring application.

• The municipal services monitoring application identifies the work order as *resolved* and it is closed.

Typical Workflow for Creating and Including an Adapter Connection in an Integration

Follow a workflow to create a connection with an adapter and include the connection in an integration in Oracle Integration Cloud Service.

Step	Description	More Information
1	Create an Oracle Field Service Cloud Service user type with API access and associate a new or existing user with the user type.	Prerequisites for Creating a Connection
2	Create the adapter connections for the applications you want to integrate. The connections can be reused in multiple integrations and are typically created by the administrator.	Creating an Oracle Field Service Adapter Connection
3	Create the integration. When you do this, you add source and target connections to the integration.	Creating an Integration and Adding the Oracle Field Service Cloud Adapter Connection to an Integration
4	Map data between the source connection data structure and the target connection data structure.	Mapping Integration Cloud Service Data of <i>Using</i> Oracle Integration Cloud Service
5	(Optional) Create lookups that map the different values used by those applications to identify the same type of object (such as gender codes or country codes).	Creating Lookups of Using Oracle Integration Cloud Service
6	Activate the integration.	Managing Integrations of <i>Using Oracle Integration Cloud Service</i>
7	Monitor the integration on the dashboard.	Monitoring Integration Cloud Services of <i>Using</i> Oracle Integration Cloud Service
8	Track payload fields in messages during runtime.	Assigning Business Identifiers for Tracking Fields in Messages and Managing Business Identifiers for Tracking Fields in Messages of <i>Using Oracle Integration Cloud Service</i>
9	Manage errors at the integration level, connection level, or specific integration instance level.	Managing Errors of Using Oracle Integration Cloud Service

Creating an Oracle Field Service Adapter Connection

A connection is based on an adapter. You define connections to the specific cloud applications that you want to integrate. The following topics describe how to define connections:

Topics

- Prerequisites for Creating a Connection
- Uploading an SSL Certificate
- Creating a Connection
- Editing a Connection
- Cloning a Connection
- Deleting a Connection

Prerequisites for Creating a Connection

These are the prerequisites for creating a connection with the Oracle Field Service Adapter. To create the connection, an Oracle Field Service Cloud Service user account is required.

- 1. Log in to Oracle Field Service Cloud Service.
- 2. Click **Configuration** in the upper right.
- **3.** Click **User Types** in the Users and Security area.
- **4.** Add a new user type or select an existing user type in the left pane.
- **5.** Enable API access for the user type:
 - Select **Allow access via API** in the Access settings area of the General tab.
 - Click the **API access** tab.
 - Select the Core API checkbox.
 - Click Core API and select ReadWrite for the objects that the user type can
 modify.
 - Select ReadWrite for Business Events and Collaboration Events.
 - Click Save.

- **6.** Associate a user with the user type:
 - Click **Settings** and then **Users**.
 - Select a user category in the left pane.
 - Add a new user or select an existing user.
 - Click Set user type.
 - Select the user type you modified in step 5 from the **User type** list.
 - Click OK.
 - For the selected user, click **Change Password** in the **Actions** column.
 - Enter the Oracle Integration Cloud Service connection password.
 - Click OK.

Uploading an SSL Certificate

Certificates are used to validate outbound SSL connections. If you make an SSL connection in which the root certificate does not exist in Oracle Integration Cloud Service, an exception is thrown. In that case, you must upload the appropriate certificate. A certificate enables Oracle Integration Cloud Service to connect with external services. If the external endpoint requires a specific certificate, request the certificate and then upload it into Oracle Integration Cloud Service.

To upload a certificate:

1. From the Oracle Integration Cloud Service home page, click the **Administration** tab in the upper right corner.

All certificates currently uploaded to the trust store are displayed in the Certificates dialog. A navigation panel on the left side of the dialog displays the following details:

- All: Displays all certificates in Oracle Integration Cloud Service.
- **System**: Displays the certificates automatically included in Oracle Integration Cloud Service. These certificates cannot be deleted.
- **Uploaded**: Displays the certificates uploaded by individual users. These certificates can be deleted and updated.
- **2.** Click **Upload Certificate** at the top of the page.
- **3.** In the Upload Certificate dialog box, enter a unique identifier for the certificate.

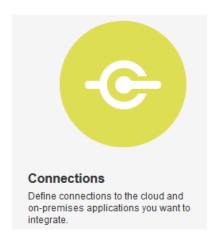
This is a name you can use to identify the certificate.

- **4.** Click **Browse** to locate the certificate file (.cer).
- 5. Click Upload.
- **6.** Click the certificate name to view details such as the subject of the certificate, the issuer of the certificate, the date the certificate was issued, and the date the certificate expires.

Creating a Connection

The first step in creating an integration is to create the connections to the applications with which you want to share data.

- 1. In the Integration Cloud Service toolbar, click **Designer**.
- 2. On the Designer Portal, click Connections.



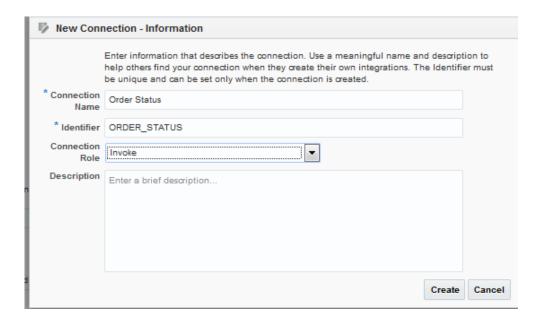
3. Click Create New Connection.

The Create Connection — Select Adapter dialog is displayed.

4. Select an adapter from the dialog. You can also search for the type of adapter to use by entering a partial or full name in the Search field, and clicking **Search**.

The New Connection — Information dialog is displayed.

- **5.** Enter the information to describe the connection.
 - Enter a meaningful name to help others find your connection when they begin to create their own integrations. The name you enter is automatically added in capital letters to the **Identifier** field.
 - Select the role (direction) in which to use this connection (trigger, invoke, or both). Only the roles supported by this adapter are displayed for selection. When you select a role, only the connection properties and security policies appropriate to that role are displayed on the Connections page. If you select an adapter that supports both invoke and trigger, but select only one of those roles, then try to drag the adapter into the section you did not select, you receive an error (for example, configure an Oracle RightNow Cloud Adapter as only an invoke, but drag the adapter to the trigger section).
 - Enter an optional description of the connection.



6. Click Create.

Your connection is created and you are now ready to configure connection details, such as email contact, connection properties, security policies, and connection login credentials.

Adding a Contact Email

From the Connection Administrator section of the connection, you can add a contact email address for notifications.

- **1.** In the **Email Address** field, enter an email address to receive email notifications when problems occur.
- **2.** In the upper right corner, click **Save**.

Configuring Connection Properties

Enter connection information so your application can process requests.

- 1. Click Configure Connectivity.
- **2.** Enter the URL used to connect to your application and process requests in the **Field Service Cloud API URL** field.

For production, the URL is https://api.etadirect.com. For development and testing, use the URL provided by Oracle when your Oracle Field Service Cloud Service instance is provisioned.

3. Enter the instance ID in the **Instance ID** field.

The instance ID is provided by Oracle when your Oracle Field Service Cloud Service instance is provisioned.

- 4. Click OK.
- **5.** Configure connection security. See Configuring Connection Security.

Configuring Connection Security

Select the security policy and define the user credentials for the connection. User authentication restricts access to authorized users.

- 1. Create a connection and configure the connection properties. See Creating a Connection and Configuring Connection Properties.
- 2. Click Configure Credentials.

The **Security Policy** field displays **Basic Authentication**. This value cannot be changed.

- **3.** Complete the **Username**, **Password**, and **Confirm Password** fields. To create a user account, see Prerequisites for Creating a Connection.
- 4. Click OK.
- **5.** Test connection connectivity. See Testing the Connection.

Configuring an Agent Group

Configure an agent group for accessing your on-premises application.

1. Click Configure Agents.

The Select an Agent Group window appears.

- **2.** Click the name of the agent group.
- 3. Click Use.
- **4.** Test the connection. See Testing the Connection.

About Agents and Integrations Between On-Premises Applications and Oracle Integration Cloud Service

Managing Agent Groups and the On-Premises Agent

Monitoring Agents

Testing the Connection

Test your connection to ensure that it is successfully configured.

1. In the upper right corner of the page, click **Test**.

If successful, the following message is displayed and the progress indicator shows 100%.

The connection test was successful!

- **2.** If your connection was unsuccessful, an error message is displayed with details. Verify that the configuration details you entered are correct.
- **3.** When complete, click **Save**.

Editing a Connection

You can edit connection settings after creating a new connection.

- 1. In the Oracle Integration Cloud Service toolbar, click **Designer**.
- **2.** On the Designer Portal, click **Connections**.
- **3.** On the Connections page, select **Edit** from the connection **Actions** menu or click the connection name.



The Connection page is displayed.

- **4.** To edit the notification email contact, change the email address in the **Email Address** field.
- **5.** To edit the connection properties, click **Configure Connectivity**. Note that some connections do not include this button. If your connector does not include a **Configure Connectivity** button, then click the **Configure Credentials** button.

Cloning a Connection

You can clone a copy of an existing connection. It is a quick way to create a new connection.

- 1. In the Oracle Integration Cloud Service toolbar, click **Designer**.
- **2.** On the Designer Portal, click **Connections**.
- **3.** On the Connections page, select **Clone** from the connection **Actions** menu.



The Clone Connection dialog is displayed.

- **4.** Enter the connection information.
- 5. Click Clone.
- **6.** Click **Edit** to configure the credentials of your cloned connection. Cloning a connection does not copy the credentials.

See Editing a Connection for instructions.

Deleting a Connection

You can delete a connection from the connection menu.

1. In the Oracle Integration Cloud Service toolbar, click **Designer**.

- **2.** On the Designer Portal, click **Connections**.
- **3.** On the Connections page, click **Delete** from the connection **Actions** menu.



The Delete Connection dialog is displayed if the connection is not used in an integration.

4. Click **Yes** to confirm deletion.

Creating an Integration

Integrations use the adapter connections you created to your applications, and define how information is shared between those applications. You can create, import, modify, or delete integrations; create integrations to publish or subscribe to messages; add and remove request and response enrichment sources; and create routing paths for different target endpoints in integrations. Click the following topics for more information.

Topic

• Creating Integrations (Using Oracle Integration Cloud Service)

Adding the Oracle Field Service Cloud Adapter Connection to an Integration

When you drag the Oracle Field Service Cloud adapter into the target area of an integration, the Adapter Configuration Wizard is invoked. This wizard guides you through configuration of Oracle FTP Cloud adapter endpoint properties.

The following sections describe the wizard pages that guide you through configuration of the Oracle Field Service Cloud adapter as a target in an integration. The Oracle Field Service Cloud adapter cannot be used as a source in an integration.

Topics

- Configuring Basic Information Properties
- Configuring Oracle Field Service Adapter Invoke Operations Properties
- Configuring Oracle Field Service Adapter Target Event Properties
- Reviewing Configuration Values on the Summary Page

For more information about Oracle Field Service adapter, see About the Oracle Field Service Adapter.

Configuring Basic Information Properties

You can enter a name and description on the Basic Info page of each trigger and invoke adapter in your integration.

Topics

- What You Can Do from the Basic Info Page
- What You See on the Basic Info Page

What You Can Do from the Basic Info Page

You can specify the following values on the Basic Info page. The Basic Info page is the initial wizard page that is displayed whenever you drag an adapter to the trigger (source) or invoke (target) area supported by your adapter.

- Specify a meaningful name.
- Specify a description of the responsibilities.

What You See on the Basic Info Page

The following table describes the key information on the Basic Info page.

Element	Description
What do you want to call your endpoint?	Provide a meaningful name so that others can understand the responsibilities of this connection. You can include English alphabetic characters, numbers, underscores, and dashes in the name. You cannot include the following: • Blank spaces (for example, My Inbound Connection) • Special characters (for example, #;83& or righ(t)now4) • Multibyte characters
What does this endpoint do?	Enter an optional description of the connection's responsibilities. For example: This connection receives an inbound request to synchronize account information with the cloud application.

Configuring Oracle Field Service Adapter Invoke Operations Properties

Enter the Oracle Field Service Adapter source event selection parameters.

Topics

- What You Can Do from the Oracle Field Service Adapter Invoke Operations Page
- What You See on the Oracle Field Service Adapter Invoke Operations Page

What You Can Do from the Oracle Field Service Adapter Invoke Operations Page

You identify the business object and the operations to perform in Oracle Field Service Cloud Service.

What You See on the Oracle Field Service Adapter Invoke Operations Page

The following table describes the key information on the Oracle Field Service Adapter invoke Operations page.

Element	Description
Select Business Object	Selects the business object in Oracle Field Service Cloud Service on which you want to operate when running an integration that uses this endpoint. When configured as an invoke, the Oracle Field Service Adapter supports operations on these business objects:

Element	Description
Select Operation	Selects the operation that you want Oracle Integration Cloud Service to invoke when running an integration that uses this endpoint.
	These operations are available for the Activity business object:
	Get Activity
	Create New Activity
	Delete Activity
	Start Activity
	Complete Activity
	Suspend Activity
	Cancel Activity
	Not Done Activity
	Move Activity
	Bulk Update Activity
	These operations are available for the Activity Link business object:
	Get Activity Links
	Get Activity Link Details
	Create Activity Link
	Delete Activity Link
	Replace Activity Link
	These operations are available for the Activity Resource Preference business object:
	Get Resource Preferences Of Activity
	Replace Resource Preferences Of Activity
	 Delete Resource Preferences Of Activity
	These operations are available for the Required Inventory business object:
	Get Required Inventories Of Activity
	Replace Required Inventories Of Activity
	 Delete Required Inventories Of Activity
	These operations are available for the Inventory business object:
	Get Inventory
	Create Inventory
	Delete Inventory
	Install Inventory
	Deinstall Inventory
	Undo Install Inventory
	Undo Deinstall Inventory

Configuring Oracle Field Service Adapter Target Event Properties Enter the Oracle Field Service Adapter target operation values for your integration.

Topics

- What You Can Do from the Oracle Field Service Adapter Trigger Events Page
- What You See on the Oracle Field Service Adapter Target Events Page

What You Can Do from the Oracle Field Service Adapter Trigger Events Page

You select the business object and associated events to send as a request to Oracle Integration Cloud Service and then from Oracle Integration Cloud Service to the invoke endpoint.

What You See on the Oracle Field Service Adapter Target Events Page

The following table describes the key information on the Oracle Field Service Adapter target Events page.

Element	Description
Select Business Object	Select the business object that you want to send to the target application. The Oracle Field Service Adapter supports operations on these business objects:
	• Activity
	Activity Link
	Activity Resource Preference
	 Inventory
	Required Inventory
	• Route
	Service Request

Element	Description
Select Events	Selects the events that you want to send to the target application.
	These operations are available for the Activity business object
	Activity Created
	Activity Updated
	Activity Started
	Activity Suspended
	Activity Completed
	 Activity Not Done
	Activity Canceled
	Activity Deleted
	Activity Delayed
	Activity Reopened
	 Activity Prework Created
	Activity Moved
	These operations are available for the Activity Link business object:
	 Activity Link Created
	Activity Link Deleted
	These operations are available for the Activity Resource Preference business object:
	Resource Preference Created
	Resource Preference Deleted
	These operations are available for the Inventory business object:
	Inventory Installed
	Inventory Deinstalled
	Customer Inventory Created
	 Customer Inventory Updated
	 Customer Inventory Deleted
	Inventory Undo Install
	 Inventory Undo Deinstall
	These operations are available for the Required Inventory business object:
	Required Inventory Created
	Required Inventory Updated
	Required Inventory Deleted
	These operations are available for the Route business object:
	Route Created
	Route Updated
	Route Activated

object:

These operations are available for the Service Request business

Customer Request CreatedInventory Request Created

Route DeactivatedRoute Reactivated

• Resource Request Created

Element	Description
Your Selected Events	Identifies the events that you have selected to send to the target application. If you select a different business object, the Your Selected Events list is cleared and you must make your selections again.

Reviewing Configuration Values on the Summary Page

You can review the specified adapter configuration values on the Summary page.

Topics

- What You Can Do from the Summary Page
- What You See on the Summary Page

What You Can Do from the Summary Page

You can review trigger (source) or invoke (target) configuration details from the Summary page. The Summary page is the final wizard page for each adapter after you have completed your configuration.

- View the configuration details you defined for the trigger (source) or invoke (target) adapter. For example, if you have defined an inbound trigger (source) adapter with a request business object and immediate response business object, specific details about this configuration are displayed on the Summary page.
- Click **Done** if you want to save your configuration details.
- Click a specific tab in the left panel or click **Back** to access a specific page to update your configuration definitions.
- Click Cancel to cancel your configuration details.

What You See on the Summary Page

The following table describes the key information on the Summary page.

Element	Description
Summary	Displays a summary of the trigger (source) or invoke (target) configuration values you defined on previous pages of the wizard.
	The information that is displayed can vary by adapter. For some adapters, the selected business objects and operation name are displayed. For adapters for which a generated XSD file is provided, click the XSD link to view a read-only version of the file.
	To return to a previous page to update any values, click the appropriate tab in the left panel or click Back .

	Reviewing	Configuration	Values	on the	Summary	Page
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Creating Mappings and Lookups in Integrations

You must map data between source connections and target connections in integrations. You can also optionally create lookups in integrations.

Topics

- Mapping Integration Cloud Service Data (Using Oracle Integration Cloud Service)
- Creating Lookups (Using Oracle Integration Cloud Service)

Administering Integrations

Oracle Integration Cloud Service provides you with the information and tools required to activate, monitor, and manage your integrations in the runtime environment.

Topic

• Administering Integration Cloud Service (in *Using Oracle Integration Cloud Service*)