Field Service

Booking Appointment and Assigning Activity Between Siebel CRM and Oracle Field Service Using an Oracle Integration Accelerator

Field Service
Booking Appointment and Assigning Activity Between Siebel CRM and Oracle Field Service Using an Oracle Integration Accelerator

F76387-04

Contents

ORACLE

ORACLE

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Preface

Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the *Oracle Help Center*.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we're working to remove insensitive terms from our products and documentation. We're also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Contacting Oracle

Access to Oracle Support

Customers can access electronic support through Oracle Support. For information, visit *My Oracle Support* or visit *Accessible Oracle Support* if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides. Please take one of the following surveys:

- For web-based user guide, *Web-based User Guide Survey*
- For tutorial feedback, *Tutorial Survey*

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Preface

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Chapter 1
Integrating With Siebel CRM

1 Integrating With Siebel CRM

Oracle Field Service and Siebel CRM Integration Overview

Oracle Field Service is integrated with Siebel CRM through an Oracle Integration accelerator (orcl.ba.sbl_ofs_sync).

This accelerator supports these functional capabilities:

- Book a field service appointment via Siebel CRM and assign the activity to a field technician in Oracle Field Service.
  - Siebel CRM remains as the primary service application, while scheduling information such as booking time slots and finding the matching resources with the required skills and availability come from Oracle Field Service. Based on this information, a field service activity gets created in Siebel CRM, and then it is assigned to a field technician in Oracle Field Service. Dispatchers or field technicians can view the activity details in Oracle Field Service.

- Transfer employee (field technician) information from Siebel CRM to Oracle Field Service.
  - Create and update a field resource in Oracle Field Service by fetching basic employee contact information from Siebel CRM.
  - Create and update field resource skills, locations, workzones and work schedules.

These key scenarios are supported in the integration:

- Book and confirm an appointment.

- Update, reschedule, and cancel an activity.

- Transfer service region information from Siebel CRM to Oracle Field Service.

- Transfer employee data from Siebel CRM to Oracle Field Service.

Install the Siebel CRM Oracle Field Service Accelerator

An accelerator provides an end-to-end business process or use case for your business. When you install an accelerator, Oracle Integration deploys all the resources required by the integrations in the package. These resources include the connections, certificates (PGP keys), lookups, and libraries.

1. Log in to Oracle Integration.
2. Search for the Siebel CRM Oracle Field Service accelerator (orcl.ba.sbl_ofs_sync).
3. Click **Install** on the accelerator card.

Configure the Connections for Siebel CRM Integration

Connections define the details of the instances of Siebel CRM and Oracle Field Service you're integrating.

1. Click **Integrations** > **Packages** > **Connections**.

   The list of installed packages is displayed.
2. Search for the package with the name "orcl.ba.sbl_ofs_sync" and then scroll down to the **Connections** section.
3. Click the Connection Name - Oracle SBL-OFS REST OFS Connection.
4. Follow the steps 1-5 in this image and configure the connection.

5. Click the Connection Name - Oracle SBL-OFS REST Siebel Connection.
6. Follow the steps 1-5 in this image and configure the connection.

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Chapter 1
Integrating With Siebel CRM
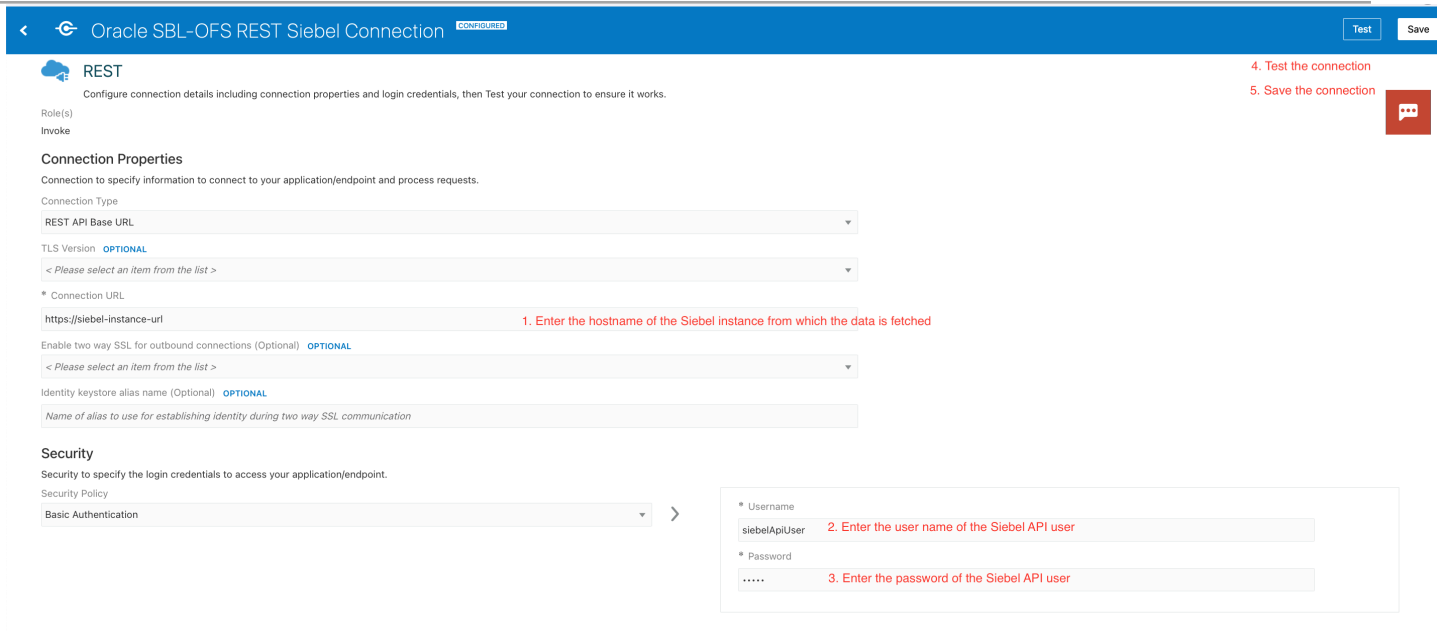
7. Click the Connection Name - Oracle SBL-OFS OFSC Adapter Connection.
8. Follow the steps 1-6 in this image and configure the connection.
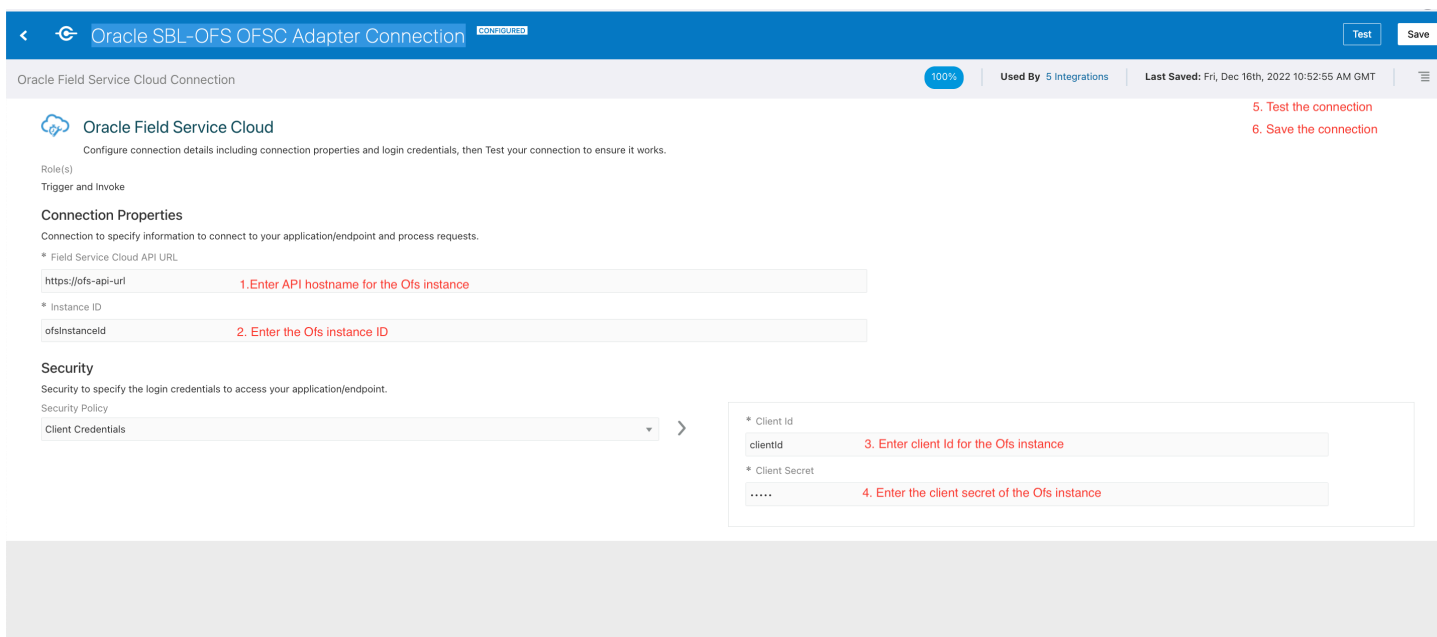
Note: To display the error messages according to the language set in Siebel CRM, you must configure the lookup table ORCL-BRT-SBL_OFS_ERROR_MESSAGE in the OIC accelerator. For more information about the lookup table, see *Configure the Lookups for Siebel CRM Integration*.

Configure the Lookups for Siebel CRM Integration

Lookup configuration helps you map similar entities of Oracle Field Service and Siebel CRM that have different values. For example, the "Service Region Id" in Siebel CRM can be treated as a "Resource Id" in Oracle Field Service.

Based on the nature of your business, the values can be different. You can configure these lookup tables according to your business requirements and execute the integration in Oracle Integration. The lookups used in this recipe are listed under **Home** > **Integrations** > **Lookups** in Oracle Integration. Click the name of the Lookup you want to configure and click the "+" icon to add more values.

This screenshot shows the Lookup page for the Siebel CRM Oracle Field Service accelerator:

This table gives the details of the lookups available for this accelerator:

Oracle Integration Lookup	Siebel CRM Value Example	Oracle Field Service Value Example	Description
ORCL-BRT-SBL_OFS_ACTIVITY_STATUS	Not Started	Pending	Map the Oracle Field Service activity status with Siebel CRM appointment status
ORCL-BRT-SBL_OFS_TIMEZONE	(GMT-08:00) Baja California Norte; Tijuana	Eastern	Map the Siebel CRM time value with Oracle Field Service time zone value.

ORACLE

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Chapter 1
Integrating With Siebel CRM

Oracle Integration Lookup	Siebel CRM Value Example	Oracle Field Service Value Example	Description
ORCL-BRT-SBL_OFS_LANGUAGE_CODE	ENU	en	Map the Siebel CRM language code value with Oracle Field Service language code value.
ORCL-BRT-SBL_OFS_WEEKDAY	Sunday	Sun	Map the Siebel CRM week day value with Oracle Field Service week day value.
ORCL-BRT-SBL_OFS_GLOBAL_CONFIG	Service Region	BK	Map the Siebel CRM global config value with Oracle Field Service global config value.
ORCL-BRT-SBL_OFS_NONWORKING_REASON	Sick Time	ILLNESS	Map the Siebel CRM global config value with Oracle Field Service global config value.
ORCL-BRT-SBL_OFS_ACTIVITY_TYPE	Appointment	siebelActivityType	Map the Siebel CRM activity type value with Oracle Field Service activity type value.
ORCL-BRT-SBL_OFS_FMR_LIMIT	Ofs_FMR_Limit	25	Default value for limit field for Find Matching Resource.
ORCL-BRT-SBL_OFS_SKILL	Expert	100	Map the Siebel CRM skill value with Oracle Field Service skill value.
ORCL-BRT-SBL_OFS_EMPLOYEE_TYPE	Employee	technician	Map the Siebel CRM employee type value with Oracle Field Service user type value.
ORCL-BRT-SBL_COUNTRY_CODE	USA	US	Map the Siebel CRM country code with Oracle Field Service country code value.

To display the error messages according to the language set in Siebel CRM, you must configure the lookup table "ORCL-BRT-SBL_OFS_ERROR_MESSAGE" in the OIC accelerator.

ofs_ErrorCode	Siebel_Language_Code	Oic_Translated_Msg
SBL_OFS_NO_EMPLOYEE_IN_A_SLOT	ENU	No employees are available in the given slot. | The first two columns define the key, and the third column is the value.

ORACLE

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Chapter 1
Integrating With Siebel CRM

Where:

Ofs_ErrorCode is a unique code that represents an error or info in the accelerator.

Siebel_Language_Code is the language code received from Siebel CRM. This accelerator contains error or info messages in ENU (English language).

Oic_Translated_Msg is the translated message to be displayed in Oracle Field Service.

Example:

Let's say your Siebel CRM instance is configured in German. Follow these steps:

1. Change the existing Siebel_Language_Code value from "ENU" to "DEU".
2. Add the message in the German language in the third column, Oic_Translated_Msg.
3. Verify the behaviour.

This table gives the field-level mapping between Siebel CRM and Oracle Field Service.

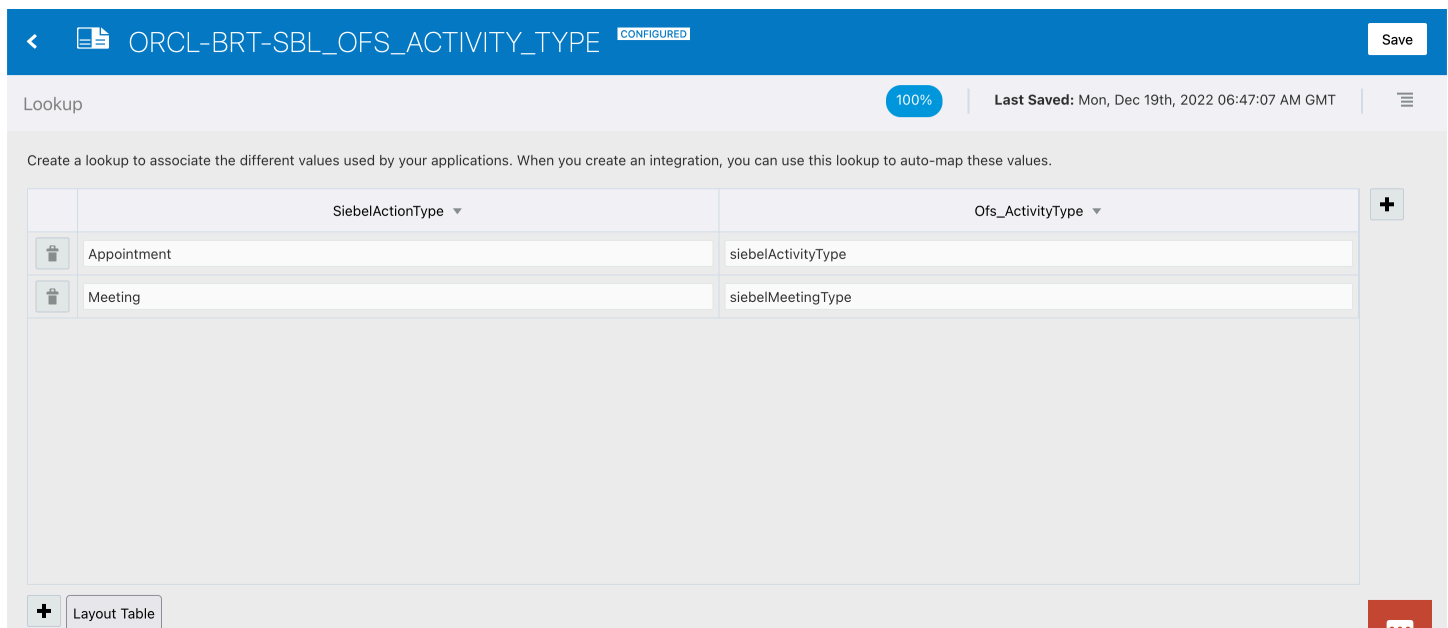| Siebel CRM	Oracle Field Service
Service Region	Resource (Type bucket)
Service Region Id	Resource External ID
Name	Resource Name
	Resource Type (defaulted to "BK")
Language Code	Language
Service Region Time Zone Name	Time zone (Lookup in Oracle Integration)
	Parent Resource ID (defaulted to "SUNRISE")
	Status (defaulted to "active" for field resource)
Service Region ZIP Codes	WorkZone
Service Region Name	WorkZone Name
Service Region Name	WorkZone Label
	Status (defaulted to "active")
	Travel Area (defaulted to "sunrise_enterprise")

ORACLE

Siebel CRM	Oracle Field Service
ZIP Codes	Keys (array)
ZIP Codes	Shapes (array)
Service Region Id	Resource External ID
	Start Date (default to current date)
Service Region Shifts	Work Schedule
Shift Name	scheduleLabel
	Start Date (default to current date)
	Is Working (defaulted to 'true')
Service Region Exception Hours	Work Schedule
Exception Hour Name	comments
Exception Hour Start Date	Start Date
	Is Working (defaulted to false)
Exception Hour End Date	End Date
	nonWorkingReason (defaulted to "HOLIDAY")
	recurEvery (defaulted to "1")
	recurrenceType (defaulted to "daily")
	recordType (defaulted to "non-working")
	shiftType(defaulted to "regular")
Employee	Resource
Employee row Id	Resource ID
Party Name	Resource Name

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Chapter 1
Integrating With Siebel CRM

Siebel CRM	Oracle Field Service
	Resource Type (defaulted to "PR")
Language Code	Language
Service Region Time Zone Name/Time Zone Name	Time zone (Lookup in Oracle Integration)
Service Region Id	Parent ResourceId
	Status (defaulted to "active" for field resource)
Work Phone Number phone	
Employee Locations Resource	Locations
Employee row Id	ResourceId
	Label(default to "Work Location")
Start Depot Address	address
Start Depot Country	Country
Start Depot City	City
Start Depot State	State
Start Depot ZIP Code	postalCode
	Label(default to "Home Address")
Primary Start Home Address	address
Primary Start Home Country	Country
Primary Start Home City	City
Primary Start Home State	State
Primary Start Home ZIP Code	postalCode

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Chapter 1
Integrating With Siebel CRM

Siebel CRM	Oracle Field Service
	Label(default to "Work Location")
End Depot Address	address
End Depot Country	Country
End Depot City	City
End Depot State	State
End Depot ZIP Code	postalCode
	Label(default to "Home Address")
Primary End Home Address	address
Primary End Home Country	Country
Primary End Home City	City
Primary End Home State	State
Primary End Home ZIP Code	postalCode
Primary Start Home ZIP Code	postalCode
	Label(default to "Work Location")
End Depot Address	address
End Depot Country	Country
End Depot City	City
End Depot State	State
End Depot ZIP Code	postalCode
	Label(default to "Home Address")

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Chapter 1
Integrating With Siebel CRM

Siebel CRM	Oracle Field Service
Primary End Home Address	address
Primary End Home Country	Country
Primary End Home City	City
Primary End Home State	State
Primary End Home ZIP Code	postalCode
Employee Exception Hours (Continued)	Work Schedule (Continued)
Exception Hour End Date	End Date
	nonWorkingReason (defaulted to "HOLIDAY")
	recurEvery (defaulted to 1)
	recurrenceType (defaulted to "daily")
	recordType (defaulted to "non-working")
	shiftType (defaulted to "regular")
Employee Skills	Work Skills
Employee row Id	Resource Id
Employee Skill Item	Work skill Name
Proficiency	Ratio
Employee Exception Hours (Continued)	Work Schedule (Continued)
Exception Hour End Date	End Date
	nonWorkingReason (defaulted to "HOLIDAY")

ORACLE

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Chapter 1
Integrating With Siebel CRM

Siebel CRM	Oracle Field Service
	recurEvery (defaulted to 1)
	recurrenceType (defaulted to "daily")
	recordType (defaulted to "non-working")
	shiftType (defaulted to "regular")
Employee Skills	Work Skills
Employee row Id	ResourceId
Employee Skill Item	Work Skill Name
Proficiency	Ratio

Book and Confirm Appointments

In a typical appointment booking scenario, a customer contacts a company and requests a service. The customer contact reviews the request and creates a service request. If this request requires a site visit by a field service technician, an activity is created in Siebel CRM and a corresponding activity is assigned to a technician in Oracle Field Service.

The customer service representative looks for an appointment window for the customer in Siebel CRM. Oracle Field Service provides the appointment slots by considering the skill required for the activity and the service region (zip codes) associated with that activity. The customer service representative confirms the appointment with the customer, which creates a new activity for a technician in Oracle Field Service.

This integration supports these scenarios as part of booking and confirming an appointment:

- Book and confirm an appointment with a wider time window.
- Book and confirm an appointment with a preferred resource (Lock assignment).
- Book an appointment with a preferred time window (Lock schedule).
- Book and confirm an appointment with a preferred resource and a preferred time slot (Lock assignment + Lock schedule).
- Insert Activity: Priority-based booking based on the earliest available time slot, based on SLA.

Book and confirm an appointment with a wider time window

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Chapter 1
Integrating With Siebel CRM

The service agent checks with the customer for a time window on a particular date (for example, Monday morning at 9 AM through Tuesday evening at 5 PM) during which a technician can visit the site and complete the job. Based on this input, the service agent assigns an activity for the best available date and time slot.

As a first step, the service agent creates an activity with these details within Siebel CRM:

- Earliest start time and latest start time. This is a wider time window (for example, Monday morning at 9 AM till Tuesday evening at 5 PM).

- Activity duration (for example, 30 minutes).

- Service region time zone.

- Service zip code.

- Skills.

- Lock assignment and lock schedule options are unchecked in Siebel CRM.

When the activity is created, the agent looks for an appropriate time slot for scheduling this activity and clicks the **Book Appointment** option within Siebel CRM. Oracle Field Service provides all the available time slots and resources in the requested time window by considering all the inputs received from Siebel CRM. If no matching resource is available in the requested time slot, a warning message "No resource found in the requested time slot" is displayed in Siebel CRM. This screenshot shows the Book Appointment dialog box in Siebel CRM:

Confirm appointment:

ORACLE

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Chapter 1
Integrating With Siebel CRM
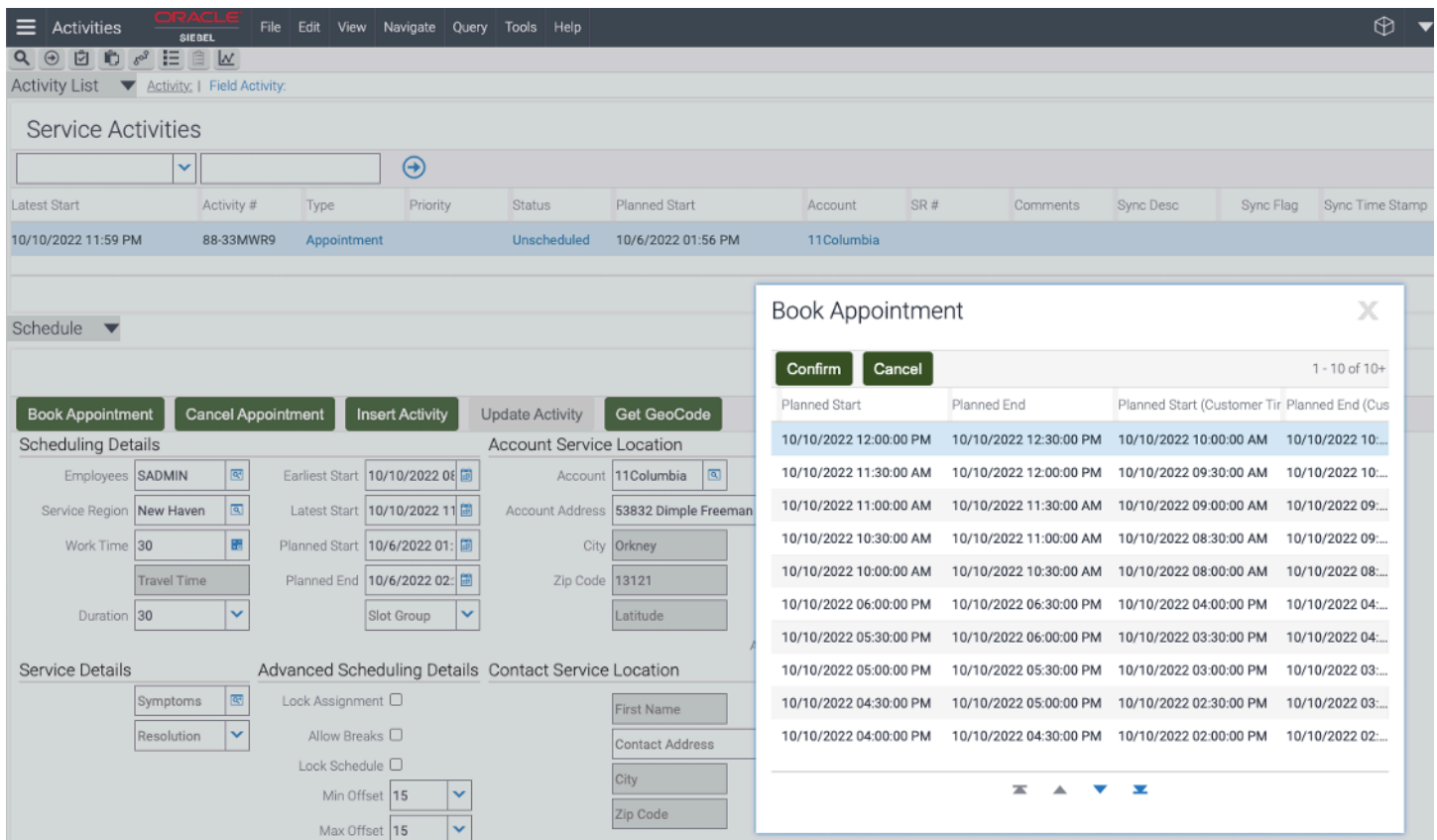
A service agent can select a time slot and an employee (a resource within Oracle Field Service) from the **Book Appointment** window and then click **Confirm**. A new activity is assigned to the selected resource in Oracle Field Service with these details:

- Work Order as the Appointment ID from Siebel CRM

- External ID as the selected Employee ID from Siebel CRM

- Service Window Start and Service Window End as the Planned Start and Planned End times selected from Siebel CRM

- Address is updated as the address from Siebel CRM

- City, State province, and Zip/Postal code are updated with the corresponding data from Siebel CRM

- Activity duration is updated as the duration provided by the service agent while booking an appointment

These details are updated in the Siebel CRM appointment:

- Status is set to "Not Started".

- Planned Start/Planned End fields are updated with the selected time slots.

- The selected resource is updated in the "Employee" field of Scheduling Details.

Book an appointment with a preferred resource (Lock assignment)

Service agent checks the available time slots for a specific resource during a given time window, and assign the activity to that resource in that time window. This table describes the input from Siebel CRM and the output expected from Oracle Field Service for booking an appointment with a preferred resource.

Input from Siebel CRM	Output Expected from Oracle Field Service
• Employee ID • Earliest start time and latest start time (for example, Monday morning at 9 AM till Tuesday evening at 5 PM) • Activity duration (for example, 30 minutes) • Service region time zone • Service zip code • Skills • Lock assignment is checked and Lock schedule is unchecked	All available slots for the specific resource in the time window. If no slots are present, then an error is returned. An activity is created in Oracle Field Service within the time specified. If no matching resource is available in the requested time slot, a warning message "No resource found in the requested time slot" is displayed in Siebel CRM.

Book an appointment with a preferred time window (Lock schedule)

In this case, a service agent checks the available resources during specific time slots and assigns the activity for that time slot to any matching resource. This table describes the input provided while creating an activity in Siebel CRM and the output expected from Oracle Field Service for booking an appointment with a preferred time window.

Input Provided while Creating an Activity in Siebel CRM	Output Expected from Oracle Field Service
- Earliest start time and latest start time (for example, Monday morning at 9 AM till Tuesday evening at 5 PM) - Activity duration (for example, 30 minutes) - Service region time zone - Service zip code - Skills - Planned start - Planned end - Lock assignment is unchecked and Lock schedule is checked	Oracle Field Service provides the available resource and time based on the planned start time and planned completion time provided by service agent. An activity is created in Oracle Field Service with the time slot specified in the Planned Start and Planned Completion time. If no matching resource is available in the requested time slot, a warning message, "No resource found in the requested time slot" is displayed in Siebel CRM.

Book and confirm appointment with a preferred resource and preferred time slot (Lock assignment + Lock schedule)

A service agent checks the availability of a specific resource in a specific time slot, and assigns the activity to that resource in that time window. This table describes the input from Siebel CRM and the output expected from Oracle Field Service for booking an appointment with a preferred resource and a preferred time slot.

Input from Siebel CRM	Output Expected from Oracle Field Service
- Resource - Earliest start time and latest start time (for example, Monday morning at 9 AM till Tuesday evening at 5 PM) - Activity duration (for example, 30 minutes) - Service region time zone - Service zip code - Skills - Planned start - Planned end - Lock assignment is checked and Lock schedule is checked	An activity is created in Oracle Field Service during the time specified by the Planned Start and Planned Completion time. If no matching resource is available in the requested time slot, a warning message "No resource found in the requested time slot" is displayed in Siebel CRM.

Insert Activity: Priority based booking based on earliest available time slot, based on SLA

Service agent creates an appointment for an earliest available time slot based on the schedule shared by the customer. The integration creates the activity in the exact slot (for a matching resource). This table describes the input from Siebel CRM and the output expected from Oracle Field Service for priority based booking based on the earliest available time slot, based on SLA.

Input from Siebel CRM	Output Expected from Oracle Field Service
• Resource • Earliest start time and latest start time (for example, Monday morning at 9 AM till Tuesday evening at 5 PM) • Activity duration (for example, 30 minutes) • Service region time zone • Service zip code • Skills	An activity is created in Oracle Field Service for the time specified with an available resource. If no matching resource is available in the requested time slot, a warning message "No resource found in the requested time slot" is displayed in Siebel CRM.

Update, Reschedule, and Cancel Activities

A service agent and update, reschedule, and cancel activities in Siebel CRM.

Update an activity

A service agent can update an activity's skill requirements after creating the activity in Siebel CRM. This results in reassigning the activity to a different resource with the required skill. This table describes the input from Siebel CRM and the output expected from Oracle Field Service to update an activity.

Input from Siebel CRM	Output Expected from Oracle Field Service
• Resource • Earliest start time and latest start time (for example, Monday morning at 9 AM till Tuesday evening at 5 PM) • Activity duration (for example, 30 minutes) • Service region time zone • Service zip code • Skills	Reassign the activity to a new resource that has the updated skill in the request.

A dispatcher or field technician must perform these actions in Oracle Field Service to update the activity in Siebel CRM:

- Complete the activity.
    - Changing the activity status to Completed in Oracle Field Service updates the activity status in Siebel CRM as "Completed".
- Update the activity as Not Done.
    - Changing the activity status to Not Done in Oracle Field Service updates the activity status in Siebel CRM as "not done".

ORACLE

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Chapter 1
Integrating With Siebel CRM

Move the activity from one resource to another.

- New resource External ID is updated in Siebel CRM as the "Employee primary owner ID " for the activity.

- Move the activity to another date for the same resource.
  - New Activity start date is updated in Siebel CRM as the "Planned Start" and "Planned Completion" dates.

- Cancel the activity.
  - Changing the activity status to Cancelled in Oracle Field Service updates the activity status in Siebel CRM as "Cancelled".

Cancel the activity

A service agent can cancel a scheduled activity by clicking Cancel Activity within Siebel CRM. This cancels the corresponding activity in Oracle Field Service.

Reschedule the activity

A service agent can reschedule an activity from the current date to another date from within Siebel CRM. The activity is updated in Oracle Field Service based on the new date provided.

Transfer Siebel CRM Service Region to Oracle Field Service

A service region is a grouping of field service technicians in a geographical area for a purpose, such as supporting a certain set of activities related to a product. Service regions ease the administrative burden by allowing service managers to set consistent schedules, constraints, and costs for a large number of employees. A service region in Siebel CRM maps to an Oracle Field Service bucket .

The transfer of service region information from Siebel CRM to Oracle Field Service is initiated by the service region administrators in Siebel CRM. This triggers the initial migration of service regions and employee (coming under that service region) information to Oracle Field Service.

Prerequisites

- The administrator must first set up the service region with Engine=iLog in Siebel CRM as well as the schedule for the service region, exception schedules for the service region, employees, and zip codes under the service region.

- A schedule with same name must be created in Oracle Field Service as well.

- The service region must then be migrated to Oracle Field Service by clicking the **Transfer to OFS** button on the service region's List view. The **Engine** field for the service region is set to "OFS".

This creates a new bucket in Oracle Field Service with the same name as the Siebel CRM service region and all the related data is updated for that bucket. This screenshot shows the Transfer to OFS button in Siebel CRM:

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Chapter 1
Integrating With Siebel CRM
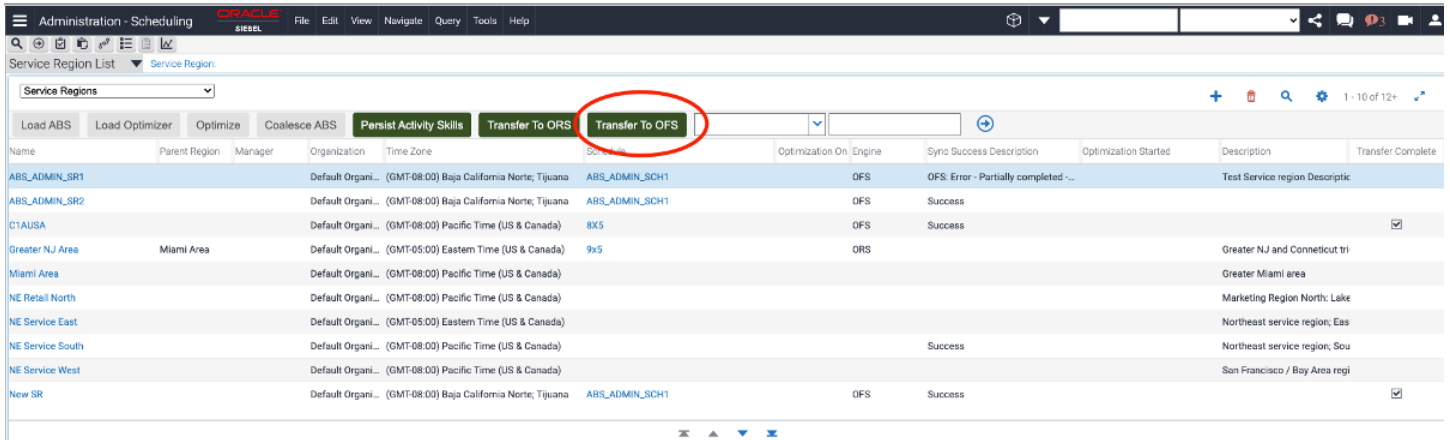
This table shows the field-level mapping between the service region and bucket:

Siebel CRM: Service Region	Oracle Field Service: Resource (Type: Bucket)
Service Region ID	External ID
Name	Bucket name
NA	Resource Type (defaulted to "BK")
Language Code	Language
Service Region Time Zone Name	Time zone (Lookup in OIC)
NA	Parent External ID (defaulted to "SUNRISE")
NA	Status (defaulted to "active" for field resource)

Be aware of these fields:

- Resource type: Resource type is configured with a default value of "BK" referring to the Oracle Field Service 'bucket' resource type, but as this is configured as a lookup value in Oracle Integration, you can update it based on your business requirements.

- Time zone : Time zone is configured with a default value of "Eastern", but as this is configured as a lookup value in Oracle Integration, you can update it based on your business requirements.

- Parent External ID: Parent External ID defaults to a value of "SUNRISE", but as this is configured as a lookup value in Oracle Integration, you can update it based on your business requirements.

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Chapter 1
Integrating With Siebel CRM

For more information about lookups, see the Using Integrations in Oracle Integration guide.

When you transfer the service region, these events also occur:

- Employees within this service region are transferred to Oracle Field Service as field technicians.

- Employee work skill, work schedule, exceptions on the work schedule, and location information is transferred to Oracle Field Service.

Exception hours

Exceptions represent special non-working days or working days. Different exception records can define exceptions for different sites, for example, U.S. holidays for a site and Canadian holidays for another site. You can define a day or continuous blocks of days as an exception to a schedule. In some cases, exception hours can define non-working periods, for example, no work on Sundays from 6:00 A.M. to 12:00 A.M. in a 7x12 schedule. In other cases, exception hours can define work periods on days that are not normal work days, for example, Saturday mornings in a 5x8 schedule.

To associate an exception with a schedule, define the exception and include this exception in the definition of a schedule.

You can also use exception hours to block the scheduled time slot for the owner of an activity to allow for another employee assignment to the activity in the same time slot. If the defined exception hours block a time slot when an activity is scheduled for the owner of the activity, then the activity is rescheduled when you reload the service region.

For more information on how to set up exception hours in Siebel CRM, see the Siebel CRM Field Service guide.

Service region zip codes from Siebel CRM are mapped as work zones in Oracle Field Service. For the integration to work, the work zone key in Oracle Field Service must be set to 'zip/postal code'.

Transfer Field Service Employees from Siebel CRM to Oracle Field Service

The transfer of field service employees from Siebel CRM to Oracle Field Service workflow in Oracle Integration transfers the employees within a service region to Oracle Field Service when the service region is transferred. In Siebel CRM, employees with the 'engine' attribute value of "Oracle Field Service" are treated as field service resources; the integration transfers only those employees to Oracle Field Service.

The employee record, and its address (home or depot), skills, exception hours (leave, meetings, and so on) are also transferred to Oracle Field Service as resource locations, resource skills, and schedules. This screenshot shows the page in Siebel CRM where can transfer employee details:

ORACLE

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Chapter 1
Integrating With Siebel CRM
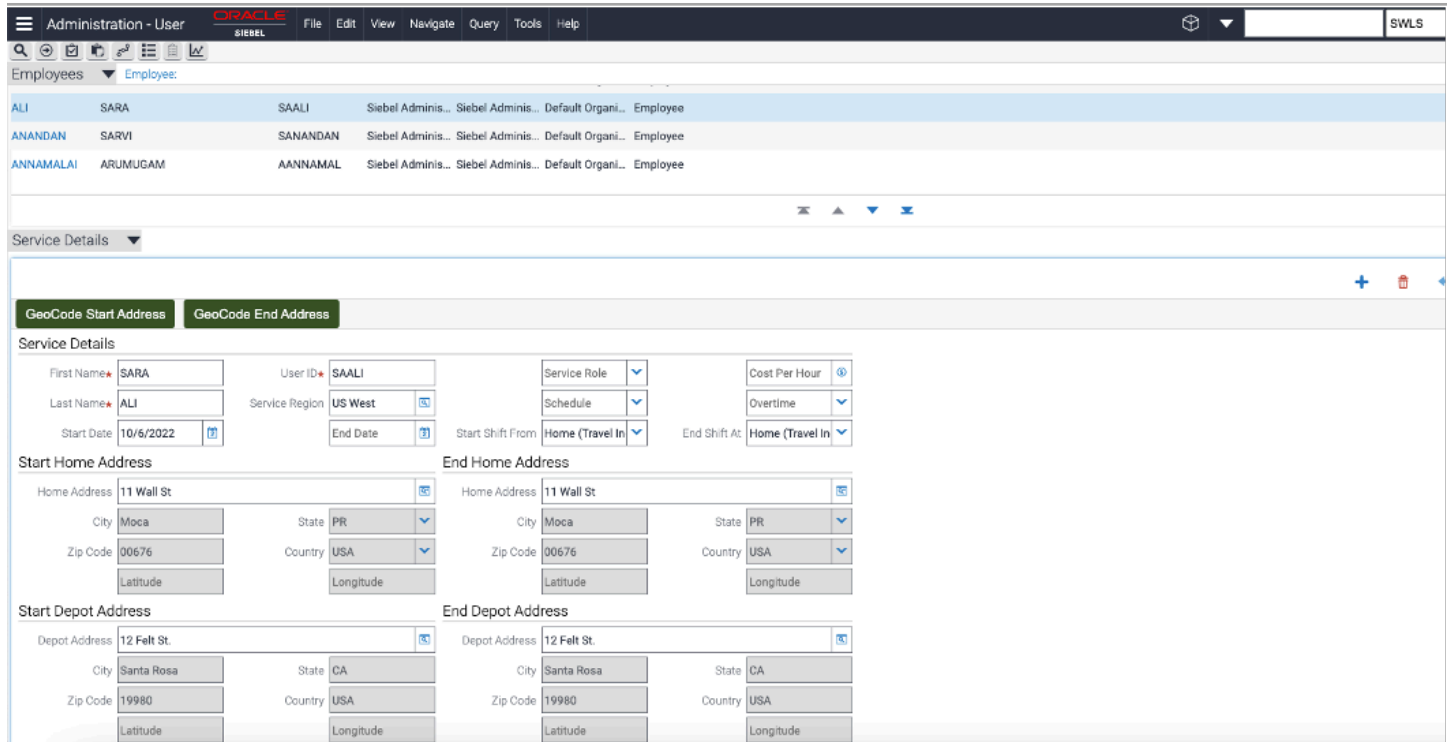
Transfer of Siebel CRM employee address to resource location

- The work start and work end location of an Oracle Field Service resource is updated based on the start and end home addresses or depot address.

- The integration updates the resource start location as the start depot address, if the employee's shift start is configured as a depot or if it's blank. In all other conditions, the start location is the location associated with the start home address.

- Similarly, the end location is the end depot address, if the employee's end of shift is configured as depot or if it's blank. In all other conditions, the end location is the location associated with the end home address.

Transfer of Siebel CRM employee skill to resource skill

The employee skill is updated as a resource skill in Oracle Field Service as part of the employee skill integration.

Note: The work skill condition is created automatically in Oracle Field Service, as part of the employee sync.You can verify and update this definition from the **Configuration** > **Work Skill** > **Work Skill Condition** page.

Transfer of Siebel CRM employee work schedule to resource schedule

As a prerequisite for this integration, an Oracle Field Service admin user has to create a schedule as an Oracle Field Service calendar configuration with the same name as the Siebel CRM schedule name. As part of the employee data transfer workflow, Siebel CRM shares the schedule name associated with the employee and updates it as a schedule in the Oracle Field Service resource's calendar. If no matching schedule is available in Oracle Field Service that corresponds to the Siebel CRM schedule, a resource is created in Oracle Field Service without a schedule and an error message is updated in Siebel CRM.

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Chapter 1
Integrating With Siebel CRM

Transfer of Siebel CRM employee exception hours

- This integration treats holidays, working exceptions (for example, meetings and trainings), exceptional cases such as working on a non-working day for example, no work on Sunday from 6:00 A.M. to 12:00 A.M. in a 7x12 schedule, in Siebel CRM this can be configured as exception to normal work schedule.

- Exception hours (holidays): If a schedule in Siebel CRM contains any holiday exception, the integration applies this holiday to the Oracle Field Service resource calendar as a non-working day.

- Working exception hours: If an employee in Siebel CRM contains any working exception hours (for example, meetings or trainings), an internal activity is created during this period, so that the field technician's availability can be updated accordingly.

- Overtime on a non-working day: If an employee in Siebel CRM contains any overtime exception, the integration applies it as a schedule in the Oracle Field Service resource's calendar for that non-working day.

Service region zip code

After the basic information is updated in the bucket, the integration migrates the zip code from the Siebel CRM service region to Oracle Field Service. While migrating a new service region, the integration checks whether there is already a work zone available with the same name in Oracle Field Service. If the work zone available, then it is updated for the bucket. If this is a new work zone, then the integration creates a work zone in Oracle Field Service. The zip codes are mapped as the work zone key in Oracle Field Service.

Incremental update of service region and employee

- Apart from the initial migration of the service region, when a business administrator updates a zip code or a holiday exception associated with the service region, that too is updated in Oracle Field Service.

- Similarly, when a business administrator updates the following information associated with an employee, that is then updated in Oracle Field Service in an incremental manner:
  - Employee basic information
  - Employee location
  - Service region associated with that employee
  - Work skill associated with that employee
  - Working exception and Non-working exception hours associated with that employee

Troubleshooting the Siebel CRM Integration

Here is how you can troubleshoot some common problems with the Oracle Field Service Siebel CRM integration.

This table provides the troubleshooting steps for some common problems:

Title	Symptom	Reason	Solution
Book Appointment failures	Book Appointment returns blank slots	No slots are returned for scheduling the activity. A possibility could be that no	Ensure that the Account Address details are provided.

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Chapter 1
Integrating With Siebel CRM

Title	Symptom	Reason	Solution
		resources are available during the specified timeframe.	Change the earlier start date and latest start date to some other date/time range.
	OIC flow throws 401 error	No slots are returned for scheduling the activity. A possibility could be that no resources are available during the specified timeframe.	Check that the Username and Password credentials provided in the business service user property of 'ORCLROFSSBLBOOKAPPOINTMENT' are correct.
	Cancel Appointment returns error "OFS: Appointment not found or not satisfied the cancel criteria"	The activity selected for cancelling the appointment is not scheduled.	Only Activities in a status of 'Scheduled' can be cancelled.

Tips to troubleshoot while transferring a service region:

Scenario	Error Message	How to Troubleshoot
Get Service Region API fails	Siebel CRM: Error getting Service Region details	Check with Siebel CRM team to see if the Siebel CRM instance is working.
Create/Update Workzone API fails	Oracle Field Service: Error Mapping Zipcode to multiple Service Region or updating Workzone	Check if any of the zipcode was associated with an another service region.
Create/Update Workzone API fails	Siebel CRM: No Zipcode for the Service Region. Oracle Field Service: Error updating Workzone	Add the zipcode to the service region and sync again.
If Schedule Id not present in the Get Service Region Response	Siebel CRM: Error - No Shifts Associated to Service Region	Associate the schedule with the service region.
Get Exception Hours API fails	Siebel CRM: Error - No Exception Hours associated or Error getting the Exception Hours	Check if the Holiday Exceptions are associated correctly with the schedule of the service region.
If Schedule name is not matching with the Work Schedule created in Oracle Field Service	Oracle Field Service: Work Schedule not defined, Misspelled or Error setting Work Schedule	Create a Work Schedule in Oracle Field Service with the Siebel CRM schedule name.
Get Employees API fails	Siebel CRM: Error getting Employees	Check with Siebel CRM team if the Siebel CRM API is working.

Tips to troubleshoot while transferring field service employees from Siebel CRM to Oracle Field Service:

ORACLE

Scenario	Error Message	How to Troubleshoot
Create Service Region Resource API fails	Oracle Field Service: Error in creating Service Region Bucket	Check if the Oracle Field Service Resource API is down or update the missing info on the service region.
Create Employee Resource API fails	Oracle Field Service: Error in creating Employee	Check if the Oracle Field Service Resource API is down or update the missing info on the employee.
Get Employee Locations API fails	Siebel CRM - Error getting Employee Locations	Check if the Oracle Field Service Resource Locations API is down.
Get Employee Shifts API fails	Siebel CRM: Error - No Shifts associated or Error getting Shifts	Check if the Siebel Shifts API is down or correct the shift data in Siebel CRM.
Set Holiday Exceptions API fails	Oracle Field Service: Error setting Exception to Employee	Check if the Oracle Field Service Resource Work Schedule API is down or correct the exception data in Siebel CRM.
Get Employee Skills API fails	Siebel CRM: No Employee Skills associated or Error in Get Employee Skills	Check if the Siebel Skill API is down or correct the skills data in Siebel CRM.
Get Employee Skill Items API fails	Siebel CRM: Error getting Employee Skill Items	Check if the Siebel Skill Items API is down or correct the skills item data in Siebel CRM.
Create Work Skill API fails	Oracle Field Service: Error creating Work Skill	Check if the Oracle Field Service Create Skill API is down or correct the skills data in Siebel CRM.
Get Employee Exceptions API fails	Oracle Field Service: Error getting Exceptions	Check if the Siebel Employee Exception API is down or correct the employee exceptions data in Siebel CRM.

ORACLE

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Revision History

Revision History

This document will continue to evolve as existing sections change and new information is added.

Revision History

Date	What's Changed	Notes
February 2023	Initial release	

ORACLE

Field Service
Booking Appointment and Assigning Activity Between
Siebel CRM and Oracle Field Service Using an Oracle
Integration Accelerator

Revision History