Oracle Fusion Cloud Applications

How Do I Set Up Fusion Service?

Oracle Fusion Cloud Applications
How Do I Set Up Fusion Service?

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Get Help

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Get Help

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Chapter 1
Enable Service Center

1 Enable Service Center

How do I enable Service Center?

To enable Service Center functionality and user interface, you just need to opt-in from Fusion Service.

> **Note:** Once you opt in to the Redwood User Interface for Service feature to enable the Redwood UI make sure to then click the pencil icon to ensure that the Service Center sub features are also enabled. There are two sub features to review are Service Requests for Redwood User Interface and Work Orders for Redwood User Interface. These separate sub features allow the administrator to control whether each set of object-related pages should be enabled in Redwood.
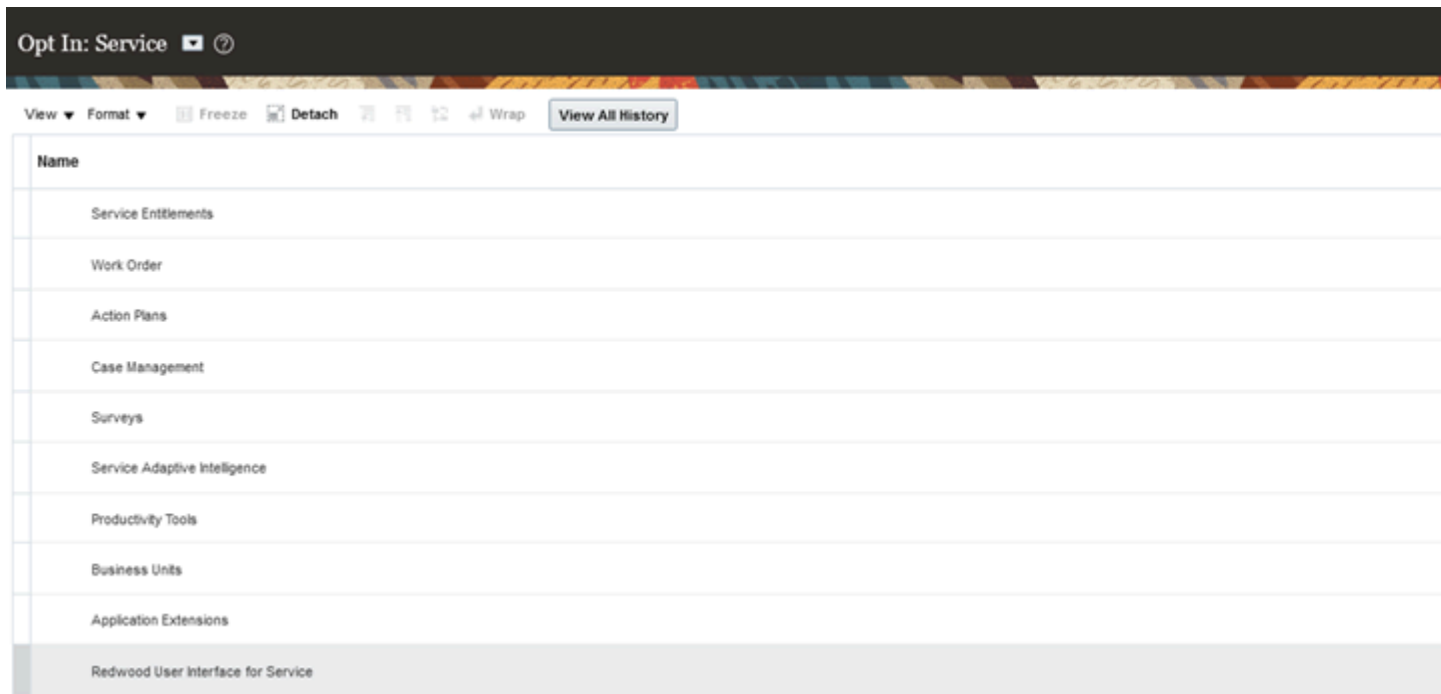
Here are the steps:

1. Sign in to the application as an administrator or setup user.
2. Click **Navigator > My Enterprise > Offerings**.
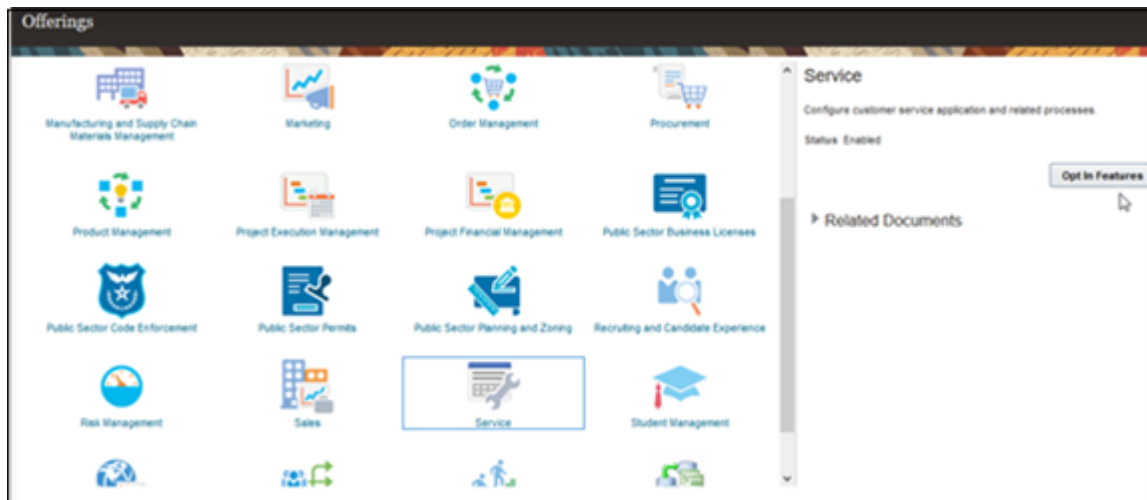
3. On the Offerings page, select the **Service** offering.
4. Click the **Opt In Features** button.
5. On the **Opt In: Service** page, review the functional areas, such as Service Requests, Channel Communication and so on.

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Enable Service Center

6. Scroll through the list until you locate **Redwood User Interface for Service**.

Opt In: Service

| View ▼ Format ▼ | Freeze | Detach | Wrap | View All History |

Name
Service Entitlements
Work Order
Action Plans
Case Management
Surveys
Service Adaptive Intelligence
Productivity Tools
Business Units
Application Extensions
Redwood User Interface for Service

7. Select **Enable**.
8. Click the **Features** (pencil) icon.
9. On the Edit Features: Redwood User Interface for Service page, enable all child features.
10. Click **Done**, and then on the Opt In: Service page, click **Done** again.

Your users can now access Service Center including Work Orders (Next Generation).

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Chapter 2
Set up required roles and privileges

2 Set up required roles and privileges

Overview of Required Privileges and Roles

The following privileges are ready-to-use with the following default job roles: Customer Service Representative and Customer Service Manager:

> **Note:** The View Service Center privilege only grants users the ability to access each of the Redwood Service Center pages. Within each page, the more detailed functionality is controlled by existing functional privileges, most of which apply to both the Visual Builder and ADF UI pages concurrently. Any custom roles you may have created also require you to add the SVC_USE_SERVICE_BASE_APP privilege to allow that role access to Service Center.

The following table shows the ready-to-use privileges.

> **Note:** In case you don't find the privileges in Security Console, run the **Import User and Role Application Security Data** process from **Navigator > Tools > Scheduled Processes**.

Privilege	Privilege Code
View Service Center	SVC_VIEW_SERVICE_CENTER_PRIV
View Navigator Menu	ORA_ZCA_VIEW_NAVIGATOR_MENU_PRIV
View Smart Actions	ZCA_VIEW_SMART_ACTIONS_PRIV
View Named Routes	ORA_ZCA_GET_NAMED_ROUTES_PRIV
Manage Installed Base Assests	SVC_MANAGE_INSTALLED_BASE_ASSETS_PRIV

> **Note:** If you're using custom roles, it's recommended that you add the following duty role as a child of your custom role: Conversation Message Management (ORA_SVC_CONV_MESSAGE_MANAGEMENT).

The privileges shown in the table enable users to access a new link in the Home Page and Navigator within the Service grouping called Service Center. If you've previously created your own roles, you must use Security Console to add these privileges to your roles. Refer to the About Security Roles topic in Related Topics.

The following table shows two additional privileges required for Service Center for the Redwood User Experience. You must create a custom role or use an existing custom role and manually add these two privileges to the custom role.

Privilege	Privilege Code
Use Service Base App	SVC_USE_SERVICE_BASE_APP

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Privilege	Privilege Code
Navigate to Service Center Pages from Notification	SVC_NAVIGATE_TO_SERVICE_CENTER_FROM_NOTIFICATIONS_PRIV

To expose the **Cases** feature, use Security Console to provide the following roles to your users:

- Case Manager: ORA_SVC_CASE_MANAGER
- Case Worker: ORA_SVC_CASE_WORKER

Related Topics
- About Security Roles

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Chapter 3
Set up Activities configurations

3 Set up Activities configurations

What Service Request Activities Track and Display

Activities track and display actions performed on individual service request records. The activities can include email exchanges, call logs, past and future tasks and appointments, as well as recent updates to the record itself.

Activities Configurations enable you to show only those objects, events and attributes that you want to display in the Activity Stream of your Service Center application.

Activities are designed to track important updates, but they don't function as an audit trail. For example, the list of activities for a service request may show that the SR was reassigned to a different agent. But the activities list may not show that someone uploaded an attachment or changed the value of an unimportant field. Administrators determine what information is displayed.

You can specify which attributes display in the Activities Stream, such as when certain values are updated, by creating an activities configuration and making it active. You create an activities configuration by duplicating an existing one.

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The screenshot shows activities and recent updates for a service request. The items shown are all the important changes Matt Hooper made to the SR. Each time you save, you create another entry with a time stamp.

What are the Activities setup tasks?

Here's a summary of the steps to set up activities in your environment.

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Activities Setup Tasks

Step	Description	Navigation and other details
1	You must create and activate an activities configuration for each object you use. You create an activities configuration by duplicating an existing one. Oracle provides a predefined configuration for each object.To use the predefined configuration, just copy it and activate it. To change what gets displayed in Activities for an object, you can edit your copy before activating it.	**Navigator > Configuration > Configure Activities Display** *How do I create and activate a service request activities configuration?*
2	Make sure the profile option Set the Common CRM Signals Active (ORA_ZCA_ENABLE_SIGNALS) is set to No. This profile is set to the value you want by default, so you might be able to skip this step.	From **Setup and Maintenance**, choose **Service**. Then click the **Tasks** icon and select the **Search** link. Search for **Manage Administrator Profile Values**.
3	Optionally, populate the Activities tabs and pages with recent activities by running the Generate Feed Elements process. If you don't run this process, all Activities panels and pages will be blank.	**Navigator > Tools > Scheduled Processes**
3	Run the Publish Feed Elements process to create the index required by Adaptive Search.	**Navigator > Tools > Scheduled Processes** *How do I run the Publish Feed Elements job to index activities?*
4	After the Publish Feed Elements process completes, set the Common CRM Signals Active (ORA_ZCA_ENABLE_SIGNALS) profile option to Yes.	From **Setup and Maintenance**, choose **Service**. Then click the **Tasks** icon and select the **Search** link. Search for **Manage Administrator Profile Values**.

Required Job Roles and Privileges for Creating Activities Configurations

To create activities configurations you need to have the following job roles and privileges.

Here are the required job roles:

- Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
- Application Implementation Consultant

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- Customer Service Representative (ORA_SVC_CUSTOMER_SERVICE_REPRESENTATIVE_JOB)

Here are the required privileges:

Required Privileges for Creating Activities Configurations

Privilege Title	Privilege Code	Description
Manage Feed Element Generations	ORA_ZCA_GENERATE_FEED_ELEMENTS	Allows generation and publishing of feed elements.
Access Feed View	ORA_ZCA_ACCESS_VIEW_FEEDS	Allows access to view feeds.
Access View Feed Configurations	ORA_ZCA_ACCESS_VIEW_FEED_ CONFIGURATIONS	Allows access to view feed configurations.
Manage Feed Configurations	ORA_ZCA_MANAGE_FEED_CONFIGURATIONS	Allows create, delete and update of feed configurations.
Manage Signal Definitions	ORA_ZCA_MANAGE_SIGNAL_DEFINITIONS	Allows creating and updating signal definitions

How You Enable and Display Activities

You enable activities on the Configure Activities Display page.

Configurations generate and display content that you have chosen in the Activity Stream. By default, the Oracle-provided configuration is not activated. Create your configuration by duplicating the provided configuration and using it as a basis for your own activities configurations.

Let's look at the following screenshot to see the different parts of the Configure Activities Display page.

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Configure What Displays in the List of Activities

Here's the different part is the Configure Activities Display page:

- **Callout 1**: Here's where you click the drop-down list and select the object you want to configure.
- **Callout 2**: Here are the list of available configurations. You can created 10 configurations per object. SEED_DATA_FROM_APPLICATION is the configuration that's provided by Oracle. You use this confguration as the basis for creating new configurations. You can't delete it, but you can duplicate and edit it.
- **Callout 3**: Click the **Action** field to display the various actions you can perform on the configuration, such as edit, activate delete, and duplicate.
- **Callout 4**: Here's where you can view an objects attributes.
- **Callout 5**: Here's where the selected and the available attributes for an object are displayed.

How do I create and activate a service request activities configuration?

You must create and activate an activities configuration for each object you use in Service Center. You create an activities configuration by duplicating an existing one.

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Set up Activities configurations

Oracle provides a predefined configuration for each object. If you want to use the predefined configuration, just copy it and activate it. If you want to change what activities get displayed for an object, you can edit your copy before activating it.

You must have the Manage Feed Configurations duty role to be able to duplicate, edit, delete, and activate a configuration. Users with the Access View Feed Configurations duty role can only view the configurations.

> **Note:**
>
> - You can't edit or delete configurations provided by Oracle.
>
> - You can have only one active configuration for each object.
>
> - You can't delete an active configuration.
>
> - You can create a maximum of 10 custom configurations for each object.
>
> - You can enable Monitor for Changes for a maximum of 50 attributes for each object in a configuration.

1. Click **Navigator > Configuration > Configure Activities Display**.
2. Select the **Service Request** object.
3. In the Activities configurations section, select an existing configuration. Oracle provides one standard configuration for each object. Look for SEED_DATA_FROM_APPLICATION in the Created By column.
4. In the Action column (the last column on the right), click **Actions** (three dots) and select **Duplicate**.
5. In the Duplicate dialog, enter a name for your configuration and an optional description.
6. Click **Duplicate**.
7. Click on the new configuration name to display its attribute setup.
8. If you want to use the configuration provided by Oracle, in other words, if you don't want to change any about the provided configuration you just copied, then skip steps 9 through 11 and activate the configuration as described in step 12.
9. If you want to change the way attributes display first, then click **Actions** and select **Edit**.
10. Configure the attributes:
    a. Select one of the objects you want to configure for display on the left pane.
    b. In the right pane, locate the attribute you want to update and set the two parameters:
       - **Make Available for Display**: makes a field available for display on the UI.
       - **Monitor for Changes**: monitors the field for updates.
11. When you're done, click **Update**.
12. To make your configuration active, click Actions (the three dots) and select **Activate**. You must then confirm that you want to activate.
    Use **Actions** (the three dots) menu to activate, delete, duplicate, and update your configurations.

Before You Run Activities Initialization Jobs

Here are the jobs roles and privileges you must have to run this initialization job.

- Job roles with the Manage Feed Element Generations privilege can do the following:

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Generate and publish activities which populate the activities stream data for users. The Sales Administrator, Service Administrators, and Application Implementation Consultant job roles have this privilege by default.

- User roles with the Access Feed View privilege can do the following:

  Access the activities REST services to view the activities of the object. This Sales Administrator, Service Administrators, and Application Implementation Consultant job roles have this privilege by default..

You also want to make sure users meet the following prerequisites before invoking the activities initialization job:

- Make sure the job is available for the Sales Administrator and Application Implementation Consultant job roles.
- Once the job is run, refer to *How do I create and activate a service request activities configuration?*.
- Make sure the ORA_ZCA_ENABLE_SIGNALS profile option is disabled, as shown in *What are the Activities setup tasks?*.
- Generate import and export artifacts for the Activities-enabled objects then makes sure the generation of the artifacts is complete.

Specify What Displays in Activities

You can specify what information displays in Activities for each record by creating an activities configuration in the Configure Activities Display page and activating it. You must create and activate a separate activities configuration for each object.

In the configuration, you can make information visible by checking two check boxes:

- Make Available for Display: Displays the attribute in activities.
- Monitor for Changes: Tracks changes in the attribute.

You must check both check boxes for the information to be visible. For many attributes, you check both check boxes for the same attribute. For example, note text is stored in the NoteTxt attribute. So, to display notes salespeople create any subsequent updates to the note text, you select both check boxes for the NoteTxt attribute:

Attribute	Unique Name	Make Available for Display	Monitor for Changes
Note	NoteTxt	Yes	Yes

To display information from certain fields, including dynamic choice list fields and fixed choice list fields, you must check the check boxes for different attributes. That's because the information that displays in the UI comes from the name column while the tracking of changes comes from the ID column. For example, if you're displaying the owner of a task, a dynamic-choice list field, there are two attributes at play:

- Owner
- Owner Party ID

The Owner field stores the name of the person identified by the Owner Party ID. You want to display the owner name in the UI, but you have to monitor the Owner Party ID to see if a new owner has been assigned. Here are the settings you make for displaying the owner:

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Attribute	Unique name	Make Available for Display	Monitor for Changes
Owner	OwnerName	Yes	No
Owner Party ID	OwnerPartyID	No	Yes

Some information displayed in this example, such as the postal address, come from aggregating multiple fields. The attribute FormattedAddress displays the address in the UI. FormattedAddress is composed of many elements including country, state, city, province, street address, and so on. There are different fields involved in different formats for each country, which you can review using the setup task Manage Formatted Addresses. Presumably, you want to display the changed address if any of address elements are updated. For that to happen, you must check the Monitor for Changes check box for all the address elements you're using and check the Make Available for Display check box for the FormattedAddress attribute. Here are the settings for just some of the available address fields:

Attribute	Unique name	Make Available for Display	Monitor for Changes
Address Line 1	AddressLine1	No	Yes
Address Line 2	AddressLine2	No	Yes
Building	Building	No	Yes
City	City	No	Yes
Country	Country	No	Yes
Postal Code	County	No	Yes
State	State	No	Yes
Address	FormattedAddress	Yes	No

If you check **Make Available for Display** for any of the address components, then you'd also see an entry for that component as well. Suppose, for example, you check **Make Available for Display** for City:

Attribute	Unique Name	Make Available for Display	Monitor for Changes
City	City	Yes	Yes
Address	FormattedAddress	Yes	No

The Activities would display two lines when the city is updated. For example:

- Address changed to 100 Main Street, New York, NY 10021
- City changed to New York

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How do I run the Publish Feed Elements job to index activities?

During intial Service setup, the activities for all your existing records are blank. You must run the Publish Feed Elements job to populate activities for each record with the date and time of the record was created. The process also publishes the indexes required for the Adaptive Search to track activities for all the objects that have activities enabled. You can't run the process separately for individual objects.

> **Note:** You run this process only once during initial Service Center setup.

1. Click **Navigator > Tools > Scheduled Processes**.
2. On the Scheduled Processes Overview page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, leave the type as **Job**.
4. In the **Name** field, type **Publish Feed Elements**, and press **Enter**.
5. Make sure that the **Production to Test Enabled** check box is unselected. You use this option only to migrate the activity indexes from production to test as part of your data migration.
6. Continue to the next steps. Or, just skip to the steps for finishing the submission, to run the process once as soon as possible with the default output.

Which records get populated with activities?

The Publish Feed Elements process populates activities in records that meet the following criteria:

Object	Criteria
Account	All accounts of type Customer and Prospect with any tasks and appointments added in the last 300 days.
Contact	All contacts that were updated in the last 300 days.

The process also populates activities for child objects of the objects that meet the preceding criteria.

Account

Child Object	Criteria
Activity Type = Appointment	All activities of type Appointment that haven't passed the due date.
	All activities of type Appointment that have passed a due date 180 days from the current date.
Activity Type = Task	All activities of type Task that have the following status: Not Started, In Progress, and On Hold.
	All tasks in Completed status that has passed the due date 180 days from current date

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Child Object	Criteria
Notes	All available notes that were created or updated in the last 180 days.
Audit	Audit log that shows the Created By and Updated By information for the Contact record.

The process also populates activities for child objects of the objects that meet the preceding criteria.

Contact

Child Object	Criteria
Activity Type = Appointment	All activities of type Appointment that haven't passed the due date.
	All activities of type Appointment that have passed a due date 180 days from the current date.
Activity Type = Task	All activities of type Task that have the following status: Not Started, In Progress, and On Hold. All tasks in Completed status that has passed the due date 180 days from current date
Notes	All available notes that were created or updated in the last 180 days.
Audit	Audit log that shows the Created By and Updated By information for the Contact record.

The process also populates activities for child objects of the objects that meet the preceding criteria.

Service Request

Child Object	Criteria
Audit	Audit log that shows the Created By and Updated By information for the service request record.
Messages	All service request messages of the following type: • Customer Entry • Response • Internal Note • Forwards • System Note • System Response
Interactions	Interactions for all SRs where StatusCd = "ORA_SVC_CLOSED" AND ChannelTypeCd IN ["ORA_SVC_CHAT","ORA_SVC_PHONE"]

Note: After this process has completed, you must set the ORA_ZCA_ENABLE_SIGNALS profile option to Yes.

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How do I migrate an index of activities from production to test?

If you want to migrate the index created for activities from your production environment to a test environment, you must run the Publish Feed Elements process in the production environment with the Production to Test Enabled check box selected.

Before you run the Publish Feed Elements process in the production environment, make sure you completed the following:

- You set up activities in the environment as outlined in the *What are the Activities setup tasks?*.

- You created an activities configuration in both production and test.

- You ran the Publish Feed Elements process in the test environment.

Note: If Data Masking is enabled during the Production to Test process, all your activities generated for the objects are deleted. You must run the Publish Feed Elements process again after the production to test process completes to populate the activity stream with the masked data.

Related Topics
- How do I run the Publish Feed Elements job to index activities?
- Create and Activate an Activities Configuration

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Chapter 4
Set up Service Center Console

4 Set up Service Center Console

How do I enable Service Center Console?

Service Center Console is an enhanced mode of user experience for service agents who handle live customer communications such as phone and chat and require a higher level of multitasking tending to service issues. Using provided in-app navigation tabs, agents can stay within a single browser tab while at the same time quickly and easily navigating between off-line work and real-time communications.

This workspace also features a purpose-built landing page that allows agents to view the most critical customer information at a glance when they receive a screen pop for an inbound communication. This feature allows agents to quickly review customer data as well as their recent interactions and service requests so they can provide more knowledgeable, personalized service as they begin their conversation with the customer.

If you have the appropriate privileges to access the Redwood User Experience, Service Center Console is enabled by default. The console is enabled by setting the ORA_SVC_ENABLE_MSI_WORKSPACE profile option to Yes.

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Chapter 4
Set up Service Center Console

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Chapter 5
Enable VB Studio

5 Enable VB Studio

How do I extend my Service Center application?

Your application is built using Oracle Visual Builder Studio and Oracle JET components. Visual Builder Studio is a single place where organizations can manage projects, environment and repositories; a Visual Builder Designer is where you can extend your application. From VB Studio, you can open many different designers.

Visual Builder Studio is the browser-based tool that your organization can use to make modifications and extensions to the Redwood user interface. Using the extension framework, you can make changes to the user interface such as displaying custom fields on forms, creating dynamic layouts for a form, or embedding custom content in a dynamic container in a page.

Your VB Studio instance is paired with your Test instance of Fusion Applications. This means that your design time experience will be based on data in the Test instance database and a sandbox in the Test instance (if you're working within a sandbox).

The changes you make using VB Studio are stored in an artifact called an application extension. An application extension can be something as simple as a field added to a cloned, custom, or new form, or a new container of forms. You can create extensions, then preview them to see how they look in your UI. To create a extension that impacts the data model, you must use a sandbox within Application Composer, then use the Edit Pages in Visual Builder option to expose your changes in the UI.

You navigate to the VB Studio Designer directly from within the Redwood application. VB Studio is a **design at runtime tool**, which allows you make UI changes and then immediately preview the results before publishing the changes to other users.

VB Studio is just one tool that administrators can use to make application changes. As previously mentioned, you extend the underlying object model used by the Redwood application with Application Composer. The model changes you make in Application Composer are reflected in the RESTful API for those objects, and thereby become available to the VB Studio Designer for use in UI extensions.

Related Topics
- Configuring Applications Using Application Composer
- How Do I Use Visual Builder Studio to Extend Oracle Cloud Applications?

Extensibility at a Glance

While Oracle Fusion Service Center applications provide robust out-of-the-box functionality, you may want to extend certain parts of your application to meet your business needs.

Here's an overview which describes the various components to consider when extending your application.

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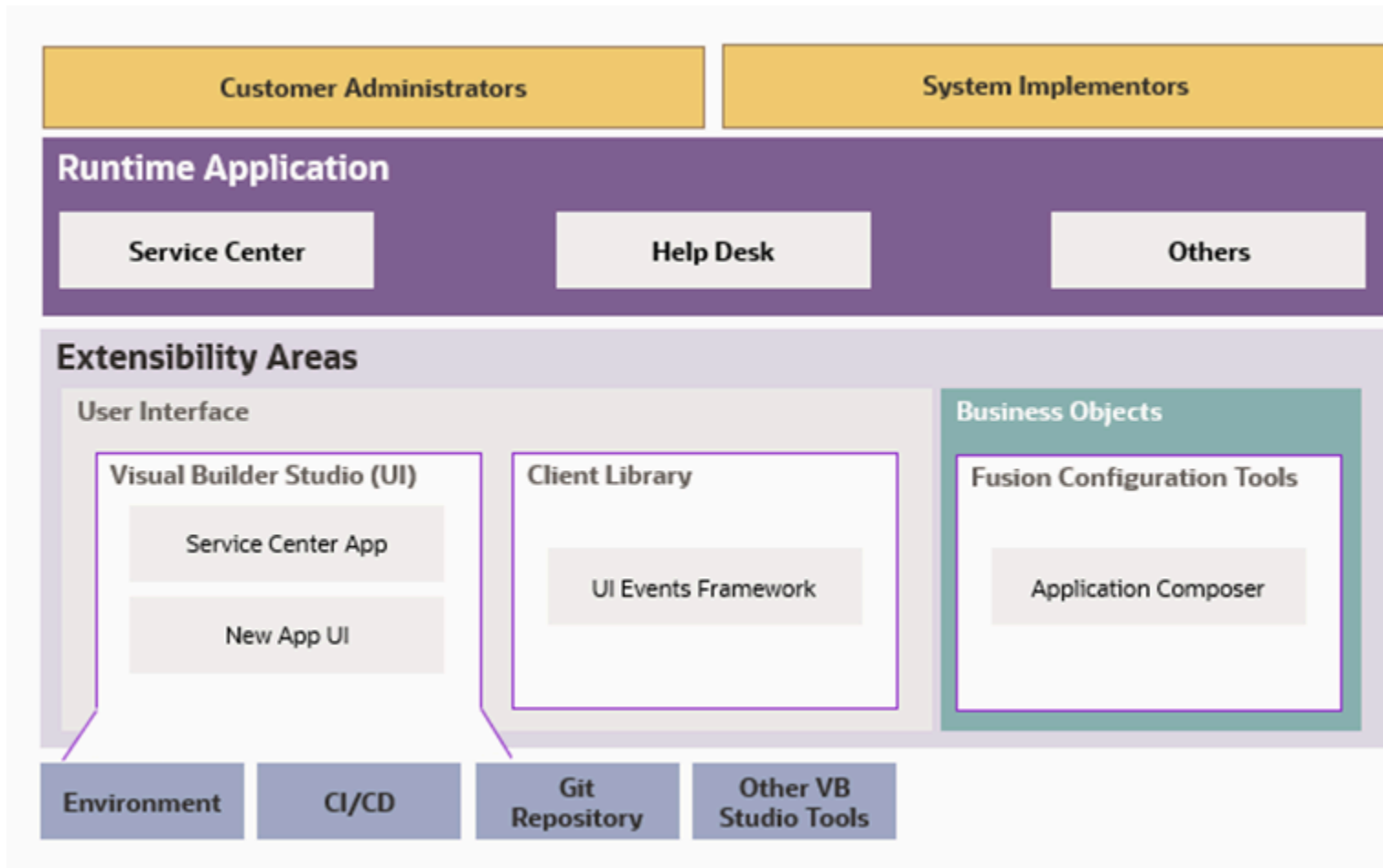
Here's a brief explanation of the elements shown in the graphic:

- Applications and Components: These are the main components you'll work with when extending the application.

- Visual Builder Studio: Enables you to create your pages and flows through the App UI, or out-of-the-box pages using Oracle CX Service UI Extension App.

  Note: The App UI is part of the Visual Builder Studio, and the core features are common among all Fusion Applications or Non-Fusion Applications.

- UI Events Framework: A client-side library that you can use in third party applications. Using this library, you can create bi-direction communication between Service Center and the application. For example, say you have an in-house order management system that needs to be embedded in Service Center and listen to events such as save or change field value, so the third party application can implement a logic upon Service Center events. Or, from the third party application, fields in the Service Center can be populated and reduce agents copy and paste activity while an embedded application.

- Application Composer: Use Application Composer toextend objects (add, remove or change fields) and create smart actions that initiate events from the server.

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Enable VB Studio

Set Up Visual Builder Studio

Before your team can start creating application extensions, you must first set up Visual Builder Studio and configure it.

For more information on setting up VB Studio, refer to the Using VB Studio guide listed in the Related Topics.

> **Note:** It's strongly recommended that you have only one deployed extension. Having multiple extensions can lead to changes being lost or not implemented. Having all changes in one extension streamlines future updates allowing you to have a complete picture of work that has been done.

Before you begin, make sure you have the following information:

- The URL of your instance of VB Studio.

  You can obtain the URL by navigating from your Oracle Cloud Applications development instance. From the Navigator, locate **Configuration**, and then select **Visual Builder**.

- Your Oracle Cloud Infrastructure (OCI) account details.

  For more information on OCI, refer to Related Topics.

Also, sign in as the user who has the VB Studio administrator role (DEVELOPER_ADMINISTRATOR) in Oracle Identity Cloud Service (IDCS).

Setting up VB Studio includes these steps:

1. Set up VB Studio users.
2. Connect to your OCI account.
3. Create a project in VB Studio.
4. Add members to your project.
5. Create the build pipeline to deploy your changes to your production environment.

Provision a Project

After you set up your VB Studio environment, you can then provision a project to extend your Service Center instance. The workflow is as follows:

- You get access to VB Studio.

- You provision a project based on the Help Desk Service Center template that's included with VB Studio.

- You then drill down on the project to use the Visual Builder Designer to extend Service Center.

Set Up VB Studio Users

In order to view the **Edit Page in Visual Builder** option in the Settings and Actions menu, users must be assigned the View Administration Link privilege (FND_VIEW_ADMIN_LINK_PRIV). By default, this privilege is assigned to the roles listed below. These roles have access to VB Studio as either a VB Studio administrator (DEVELOPER_ADMINISTRATOR) or VB Studio user (DEVELOPER_USER) in IDCS:

- Application Administrator (ORA_FND_APPLICATION_ADMINISTRATOR_JOB)

- Service Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)

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Enable VB Studio

- Customer Relationship Management Application Administrator
  (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)

- Application Developer (ORA_FND_APPLICATION_DEVELOPER_JOB)

The roles listed above are predefined roles. For custom roles, IDCS creates a group representing users assigned to that role. You must give the IDCS group access to VB Studio. To do this, you assign the group to either the VB Studio administrator (DEVELOPER_ADMINISTRATOR) or VB Studio user (DEVELOPER_USER) role in IDCS:

1. Login as an administrator to Oracle Identity Cloud Service.
2. In the Identity Cloud Service console, expand the Navigation Drawer, and then click **Oracle Cloud Services**.
3. Click **DevServiceAppAUTO_<VBSTUDIO_INSTANCE>**.
4. Click the Application Roles tab.
5. On either the DEVELOPER_ADMINISTRATOR or DEVELOPER_USER row, click the menu icon, then click **Assign Groups**.
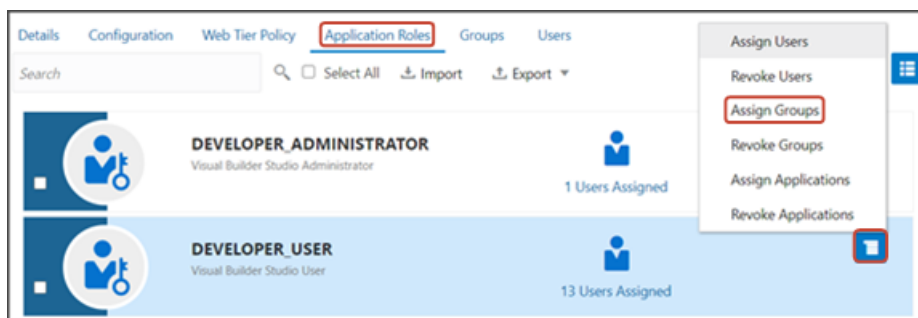
6. Locate and select the group created for the custom role, then click **OK**.

Users with the custom role can now access VB Studio. Note that sometimes it may take up to 12 hours for Oracle Cloud Applications user updates to sync with IDCS.

For more information, see "Set Up VB Studio Users" in the Related Topics section below.

Connect to Your Oracle Cloud Infrastructure Account

Before you can use VB Studio, you must connect to your Oracle Cloud Infrastructure (OCI) account.

1. Navigate to your instance of VB Studio using the URL provided to you.

   You can also access VB Studio from your Oracle Cloud Applications development instance. From the Navigator, under **Configuration**, select **Visual Builder**.
2. Click the **Organization** tab on the left pane, then click the **OCI Account** tab.
3. Click **Connect**.
4. In the **Configure OCI Account** dialog, enter your OCI credentials.

   VB Studio uses this account for storing artifacts and running builds.

Create a Project

Next, create the project. In VB Studio, a project is a collection of resources that your team will use to create the application extension.

1. Still on the Organization tab, click the **Projects** tab.
2. Click **Create**.

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3. In the New Project dialog, enter a name and description for the project, such as Case Management Service Center Help Desk. Click **Next**.
4. Select **Application Extension** as the template to use for this project, and click **Next**.

   This template creates a Git repository if you choose one along with an, environment, build pipeline, and workspace. You can also choose to create a scratch repository.
5. On the Application Extension Project Properties page, select the name of the development Oracle Cloud Applications instance. In this case, select **Oracle Applications Cloud (Fusion)**.
6. The Git repository name is based on your project name, so you can accept the default.
7. Select the base Oracle Cloud application. In this case, select **Service Center**.
8. Click the **Create Workspace** toggle.
9. In the Wiki Markup field, select **Confluence**.
10. Click **Finish**.

VB Studio provisions your project, which could take a few minutes to complete. You will then be navigated to the project's home page.

Add Members to Your Project

Next, add members to your project.

1. On the project's home page, click the Team tab on the right side of the page.
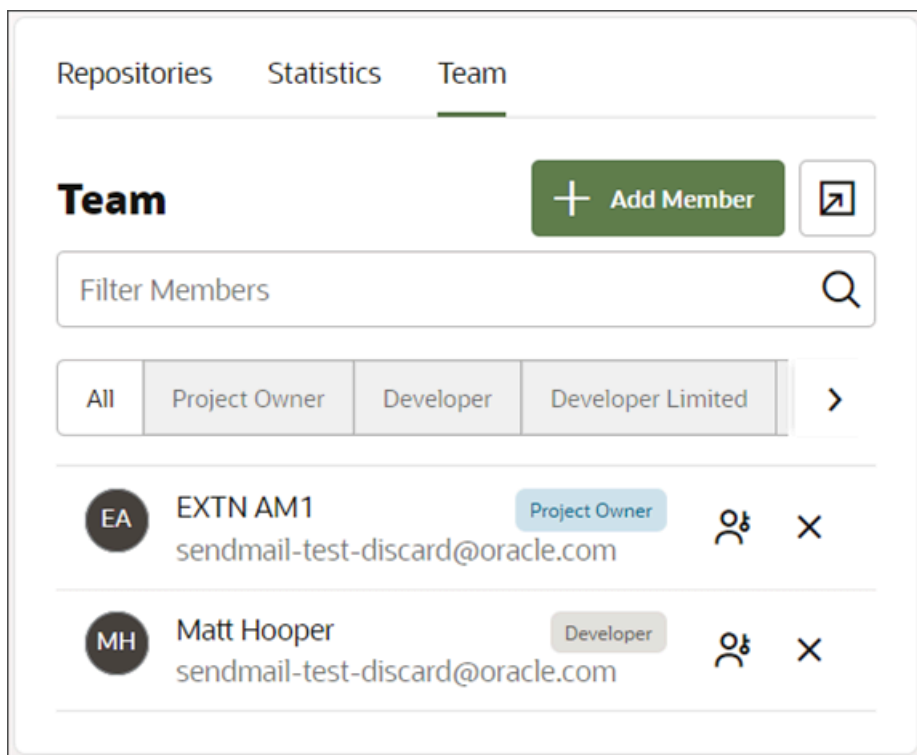
2. Click **Add Member**.
3. In the Add Member dialog, select the level of membership of the team member.

   o Assign the Developer role to trusted users who can access code files, build, and deploy the application.

   o Assign the Limited Developer role to users who want to work on making changes, but don't run build jobs.

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- ○ Assign the Contributor role to users who can access the project, but don't update the code files.

4. Enter the member's user name.

Create the Production Build Pipeline

When you created your project, a build pipeline was automatically created to deploy your application extension to your test environment. Now you must create a second pipeline for your production environment.

For complete instructions, see "Set Up the Project to Deploy for Production" in the Related Topics section below.

Related Topics
- Using VB Studio
- Video: Setting Up Visual Builder Studio for Oracle Cloud Application Extensions
- Set Up VB Studio Users
- Set Up the Project to Deploy for Production
- Oracle Visual Builder Cookbook

How to Provision a VB Studio Project Using an Application Template

Before you extend your application, you must first provision a VB Studio project and use the Service Center Extensibility Template.

Here are the steps to provision a project and get Visual Builder ready:

1. Access Visual Builder for your instance.
2. Click **Create**.
3. In the **New Project** dialog box, enter the project's name, and then click the **Private** or the **Shared** button in the Security area depending on your needs.
4. Click **Next**.
5. Select **Application Extension** and click **Next**.
6. Click the drop-down list for **Oracle Cloud Applications Development Instance** and select your instance, then you base application and template.

   For the Service Center, select **Oracle CX Service UI Extension**.
7. Click **Next**, then click **Finish**.

Service Request Standard Pages Extensibility Matrix

Service Center offers numerous extensible components in its out-of-the-box pages making it possible to adopt them and accelerate your project implementation. The following table shows a matrix of Service Center standard pages along

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with their extendable components along with possible usage of those components. Use this matrix to address your business needs using the out-of-the-box pages.

- Customize Dynamic Tables and Forms are forms and tables used in our standard pages that you can extend. For example, create and change a layout such as adding and removing fields.

- Custom Actions are containers in certain pages that enable you to add new buttons to perform validation and actions on top of the standard pages.

- Display Your Own Content refers to containers that enable you to create your own content, such as a new foldout panel.

- Configurable Components comprise variables which can be exposed in the standard pages to change an extension's behavior. For example, the back button link on the service request detail page can be changed so the extension can pass a new label name and URL that goes to a custom app instead of back to the Service Request list.

- The UI Events Framework is a client-side library that you can use to extend an external application to listen to Service Center events or initiate actions creating a seamless integration and a new level of extension.

Page Name	Customize Dynamic Tables and Forms	Custom Actions	Display Your Own Content	Configurable Components	UI Events Framework	Possible Usage
landing	No	Yes	Yes	Yes	No	• Create and change the layout (for example, add and remove fields including custom business object). • Create a field template (for example, input text make it as a hyperlink). • Add buttons to perform actions and validations. • Add and remove columns from Service Request list. • Add a row-level action to the Service Request list.
create	Yes	No	No	No	Yes	• Create and change the layout (for example, add and remove fields including custom business object). • Create a field template (for example, input text make it as a hyperlink).
edit	Yes	Yes	Yes	Yes	Yes	• Create and change the layout (for example, add and remove fields including custom business object). • Create a field template (for example, input text make it as a hyperlink). • Add buttons to perform actions and validations.

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Page Name	Customize Dynamic Tables and Forms	Custom Actions	Display Your Own Content	Configurable Components	UI Events Framework	Possible Usage
						• Change the label and URL path of the link to return to the list page. • Modify variables using an extension.
copy	Yes	No	No	No	Yes	• Create and change the layout (for example, add and remove fields including custom business object). • Create a field template (for example, input text make it as a hyperlink).
svc-interaction	Yes	Yes	Yes	Yes	Yes	• Create and change the layout (for example, add and remove fields including custom business object). • Create a field template (for example, input text make it as a hyperlink). • Modify variables using an extension.
categories	Yes	No	No	No	No	• Add and remove columns from the category list. • Add and remove fields from the search form. • Create rule set for dynamic UI.
search-results	No	No	Yes	Yes	No	• Change the search container • Modify variables using an extension.
view-article	No	No	Yes	No	No	Modify variables using an extension.

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