Configuration Assistant

May 18, 2015

Part Number
E63169-01

Oracle Service Cloud Configuration Assistant
Part Number E63169-01

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Oracle Service Cloud Configuration Assistant

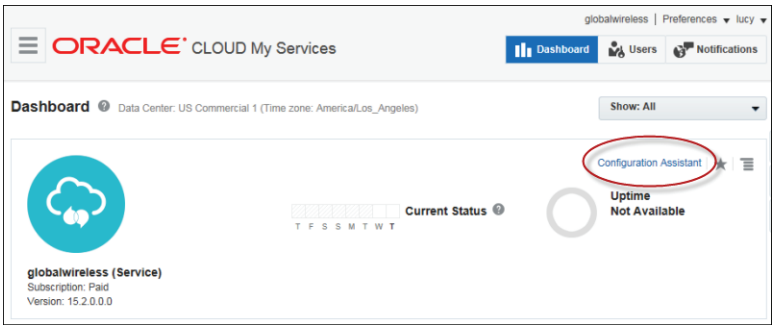
The Oracle Service Cloud Configuration Assistant lets you manage your Oracle RightNow Cloud Service (Service) sites through the Oracle Public Cloud. The Configuration Assistant lets you set up and manage the following.

- Interfaces—Available for Service
- Mailboxes—Available for Service, Oracle RightNow Outreach Cloud Service (Outreach) and Oracle RightNow Feedback Cloud Service (Feedback)
- Test sites—Available for Service and Oracle Policy Automation (OPA)
- Integrations—Ability to enable certain Service Cloud functional areas
  - ▷ Smart Interaction Hub (SIH)
  - ▷ Oracle Social Network (OSN)

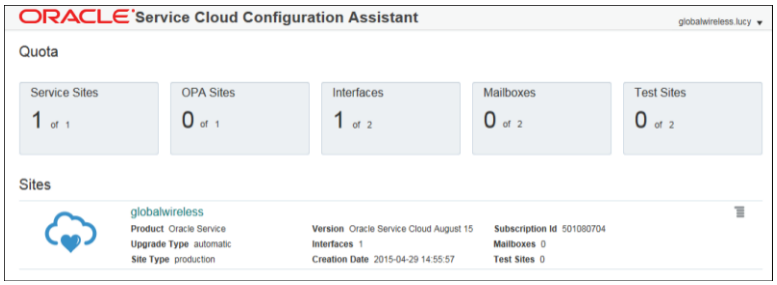
Note You can also manage certain aspects of your OPA site interfaces. While you cannot add interfaces to OPA sites, you can make changes to the URL and time zone values of an OPA interface.

Getting started

Oracle Cloud will send a welcome email with information about the services you can access from the Oracle Public Cloud. Once accessed, you will be able to log in to the Oracle Cloud My Services dashboard. From there, you can access your specific service as well as the Configuration Assistant by clicking the Configuration Assistant link.



Important Because Oracle often updates the Configuration Assistant to enhance its functionality, screens and procedures may not always match this documentation.



The Configuration Assistant home page contains a Quota section and a Sites section. The Quota section shows the actual number as well as the total number of available Oracle Service Cloud sites, OPA sites, interfaces, mailboxes, and test sites. The number of available sites, interfaces, mailboxes, and test sites is based on the number your organization has purchased.

The Sites section displays all your sites and shows information about each site, including upgrade type, site type, product version the site uses, number of interfaces, creation date, site subscription ID, number of mailboxes, and number of test sites.

Creating test sites

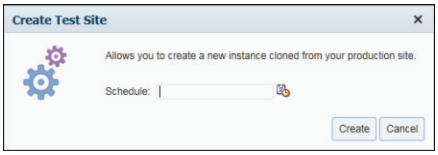
When you create a test site, you schedule a request for your production site to be cloned, which creates a copy of your existing site. Your request is added to a queue of schedules operations. Depending on the size of your site and the number of sites ahead of yours in the queue, this process can take up to several hours to complete. A large site could take several days to clone.

To create a test site

1 From the Configuration Assistant home page, click the OPA or Service site for which you want to create a test site. The Site Details page opens.

2 Click the menu icon in the upper right corner and select Create Test Site.

The Create Test Site window opens.



3 Type the date and time you want your production site to be cloned in the Schedule field.

4 Click Create.

By performing these steps, you have scheduled a request for a clone of your production site to be created. This clone becomes your test site and will display on the Configuration Assistant home page when the scheduled operation completes. Remember, depending on the size of your site and the number of sites ahead of yours in the queue, the timing of this process can vary from several hours to several days.

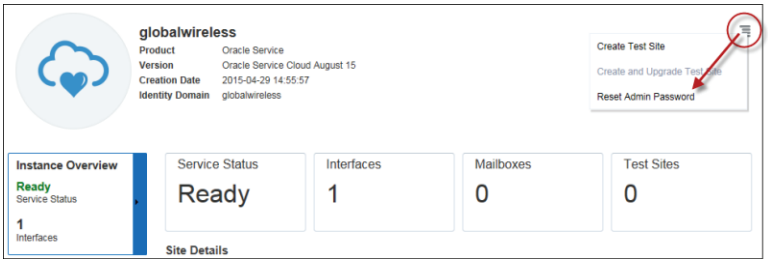
Resetting the System Administrator password

Your Oracle Service Cloud site has a system-defined administrator account, known as the System Administrator. By default, the System Administrator is granted the highest level of permissions available that includes all possible permissions. The System Administrator is the "administrator" login on Service sites and the "admin" login on OPA sites.

To reset the System Administrator password

1 From the Configuration Assistant home page, click the OPA or Service site that you want to reset the System Administrator password for. The Site Details page opens.

2 Click the menu icon in the upper right corner and select Reset Admin Password.



3 Click Yes to confirm the password reset. If successful, a message tells you that the System Administrator password has been reset, and an email containing the new password has been sent to your email address.

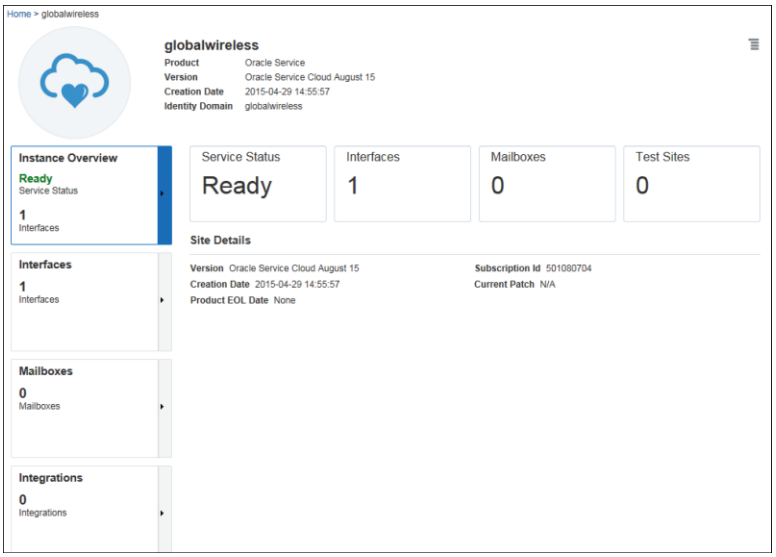
4 Click OK.

Adding and editing interfaces

You can add interfaces to your Oracle Service Cloud site. You can also edit existing interfaces.

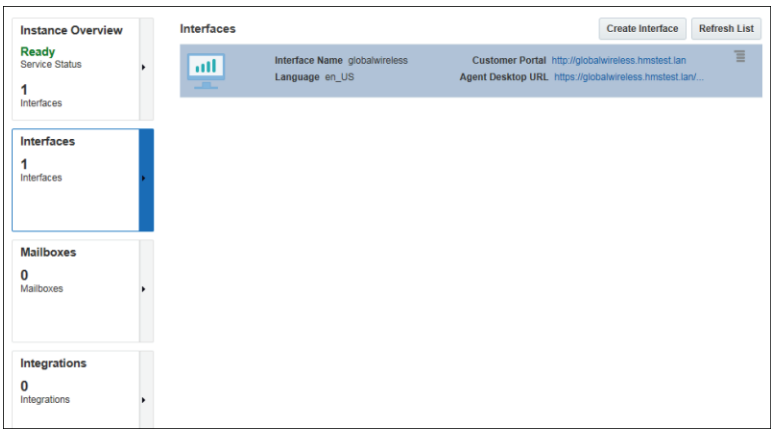
To add an interface

1 From the Configuration Assistant home page, click the Service site to which you want to add an interface. The Site Details page opens.



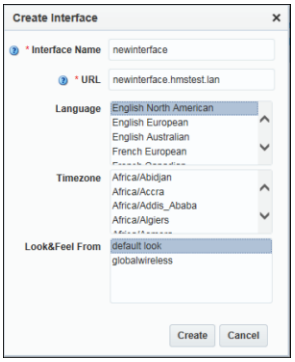
Note You cannot add interfaces to OPA sites. You can, however, make changes to the URL and time zone values of an OPA interface. See step 3.

2 Click inside the box labeled Interfaces. The Interfaces page opens.



From this page, you can access the Customer Portal site or the Oracle Service Cloud site associated with each interface by clicking the hyperlinks next to the Customer Portal and Agent Desktop URL labels.

3 Click Create Interface. The Create Interface window opens.



4 Enter the following field information.

Table 1: Create Interface Window Description

Field	Description
*Interface Name	Type the name of the interface in this field. This field accepts alphanumeric characters but cannot contain spaces. The name also cannot start or end with an underscore.
*URL	Type the URL of the virtual host (vhost) for your site in this field.
Language	Select the language you want this interface to use. For a list of available languages, see Answer ID 318 on the Oracle Service Cloud support site.
Timezone	Select the time zone you want this interface to use.
Look and Feel From	Select the formatting style you want applied to the user interface.

5 Click Create. If successful, a message confirms that your request to add an interface has been submitted.

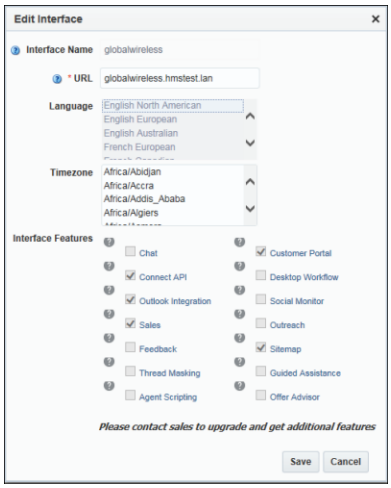
6 Click OK. The new interface displays at the bottom of the list on the Interfaces page.

Tip Once the process completes, you may need to click Refresh List to update the list of interfaces that displays on the page.

To edit an interface

1 From the Configuration Assistant home page, click the Service site to which you want to edit an interface. The Site Details page opens.

2 Click the menu icon next to the Customer Portal URL label and select Edit. The Edit Interface window opens.



3 Enter the following field information.

Table 2: Edit Interface Window Description

Field	Description
*Interface Name	This is a read-only field when editing an interface.
*URL	Type the URL of the virtual host (vhost) for your site in this field.
Language	This is a read-only field when editing an interface. For a list of available languages, see Answer ID 318 on the Oracle Service Cloud support site.

Table 2: Edit Interface Window Description (Continued)

Field	Description
Timezone	Select the time zone you want this interface to use.
Interface Features	This read-only section lists the products and components available in Oracle Service Cloud. The check boxes that are selected are the products and components that are enabled on your interface. **Note:** To purchase additional products or components, contact your Oracle account manager.

4 Click Save.

Tip Once the process completes, you may need to click Refresh List to update the list of interfaces that displays on the page.

Adding and editing mailboxes

You can add mailboxes and edit existing mailboxes to your Oracle Service Cloud site, including Oracle-managed Service mailboxes as well as Outreach and Feedback mailboxes.

Important To ensure accurate processing of replies, inbound messages, and bounces, Outreach mailboxes cannot be shared with Oracle-managed Service mailboxes. For this reason, you must set up one mailbox for Service and a separate mailbox for Outreach and Feedback.

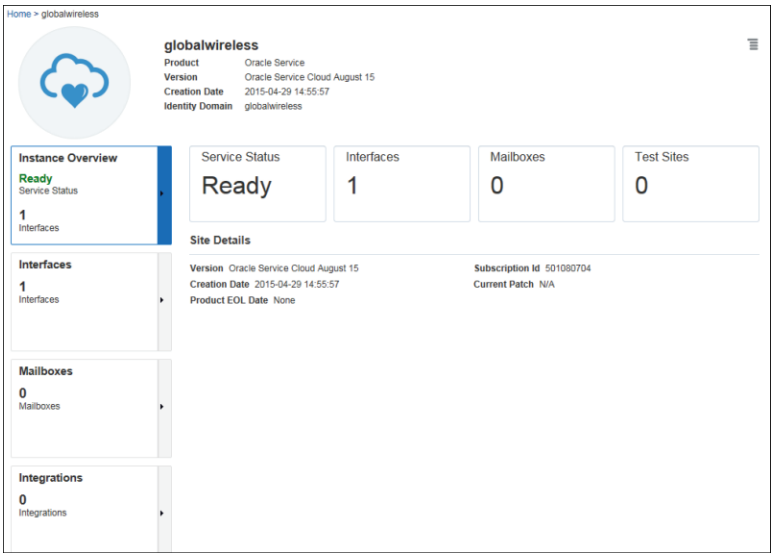
Once you've created a new mailbox, you can disable it or delete it, but you cannot change any other attributes associated with the mailbox from the Configuration Assistant.

Tip If you want to change the mailbox name that displays to your customers, you can make this type of change from the Service application. Mailbox configuration options available from Service include the following.

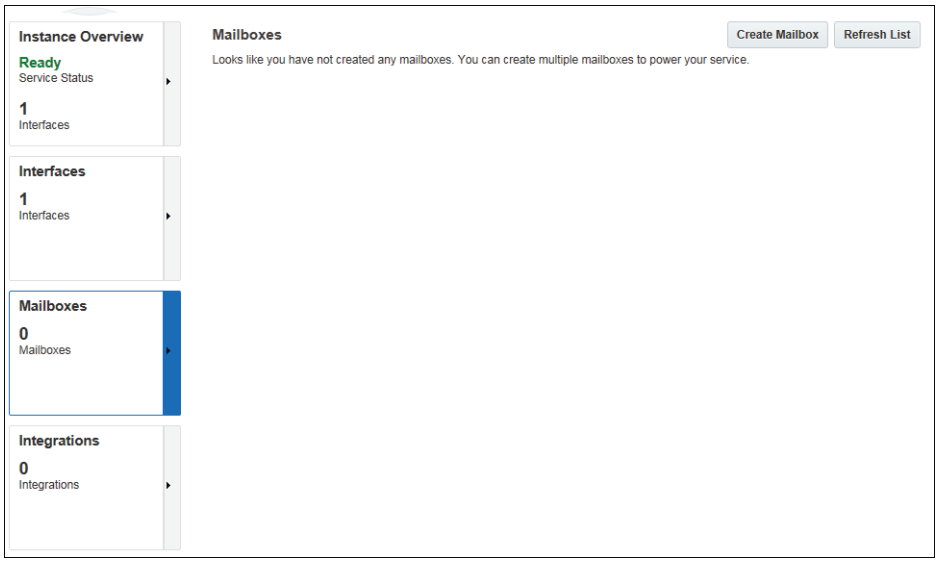
- Brand your mailbox to match your organization's brand identity
- Define the bounce address that will be used as the return path for bounced emails
- Define the display name you want to appear on outgoing messages as the sender

To add a mailbox

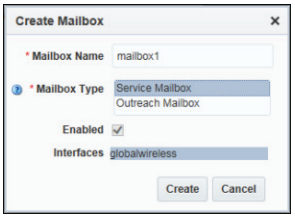
1 From the Configuration Assistant home page, click the Service site to which you want to add a mailbox. The Site Details page opens.



2 Click inside the box labeled Mailboxes. The Mailboxes page opens.



3 Click Create Mailbox. The Create Mailbox window opens.



4 Enter the following field information.

Table 3: Create Mailbox Window Description

Field	Description
*Mailbox Name	Type the mailbox name in this field. The field is limited to 80 characters and cannot start with a number, contain spaces, or consecutive underscores. The name can contain only lowercase letters, numbers, underscores, periods, and dashes.
*Mailbox Type	Select the mailbox type, either Service or Outreach, in this field. **Note:** Service mailboxes are used with Oracle RightNow Cloud Service applications. Outreach mailboxes are used with both the Oracle RightNow Outreach Cloud Service *and* Oracle RightNow Feedback Cloud Service applications.
Enabled	This read-only field is enabled by default. **Note:** You can disable this field by clearing the check box after the mailbox has been created. See To edit a mailbox.
Interfaces	Select the interface you want to associate the mailbox with.

5 Click Create.

Note You may need to click Refresh List to see your new mailbox display on the Mailboxes page.

If the procedure to create a mailbox is successful, you will receive an email containing your new mailbox password.

Important If you are using the August 2013 release or later of Oracle Service Cloud, Service mailboxes will be automatically configured as Oracle-managed Service mailboxes.

Additional mailbox configuration options are available in the Service application, including branding your mailbox and defining the bounce address and the display name.

To edit a mailbox

1 From the Mailboxes page, click the menu icon next to the Mailbox Type label and select Edit. The Edit Mailbox window opens.

2 To disable a mailbox, clear the Enabled check box.

Caution If you disable a mailbox, email sent to the address associated with the mailbox continues to accumulate. However, it will not be delivered.

3 To enable a mailbox, select the Enabled check box.

Caution When you enable a mailbox, all email that accumulated while this mailbox was disabled will be delivered.

4 Click Save. If successful, a message tells that your changes were made.

5 Click OK.

Note The Configuration Assistant lets you edit only the mailbox's Enabled check box. Additional mailbox configuration options are available in the Service application.

To delete a mailbox

Caution Deleting a mailbox is a permanent action. For instance, if you delete a mailbox that is associated with an email address your customers use, any email sent to that address will be rejected and you will not receive it.

1 From the Mailboxes page, click the icon next to the Mailbox Type label and select Delete.

2 Click Yes to confirm the mailbox deletion.

Tip You may need to click Refresh List to remove the mailbox from the list of mailboxes that displays on the Mailboxes page.

To reset the mailbox password

1 From the Mailboxes page, click the icon next to the Mailbox Type label and select Reset Password.

2 Click yes to confirm the mailbox password reset.

If successful, a message tells you the password has been reset and a new one has been sent to your email address.

3 Click OK.

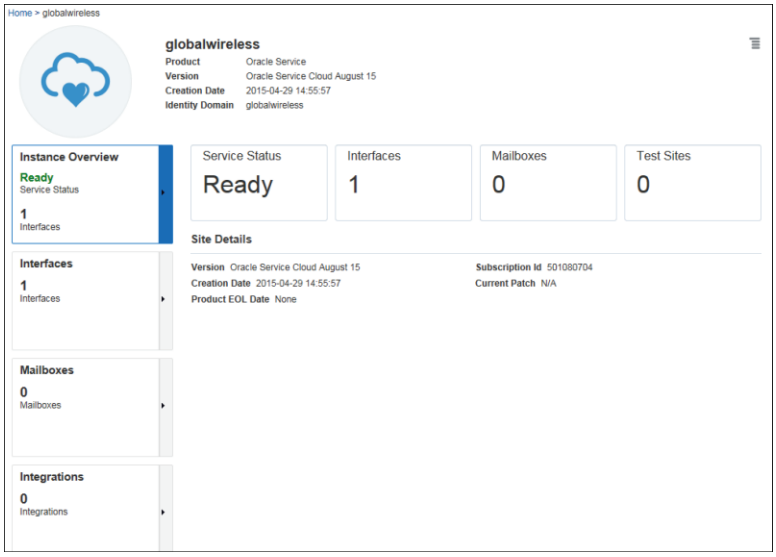
Oracle Cloud integrations and Oracle Service Cloud product add-ons

The Configuration Assistant lets you enable and automatically connect to certain integrations and product add-ons based on the Oracle Cloud applications and Oracle Service Cloud product add-ons your organization has purchased. Once purchased, you can enable the following offerings from the Configuration Assistant.

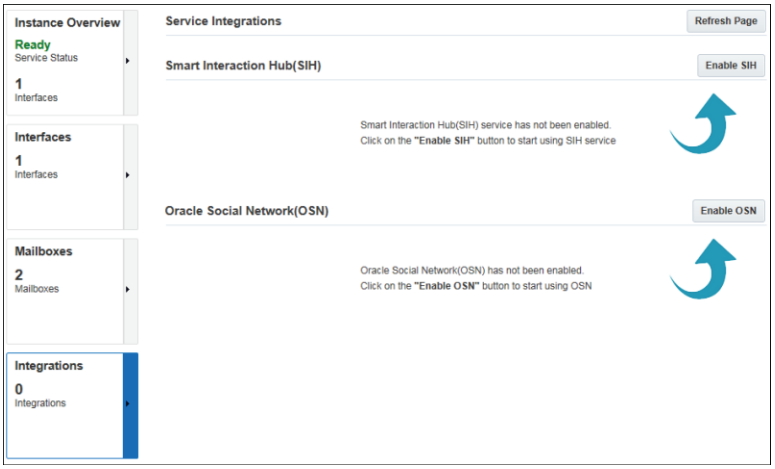
- Smart Interaction Hub
- Oracle Social Network

To enable integrations or product add-ons

1 From the Configuration Assistant home page, click the Service site for which you want to enable an integration or product add-on. The Site Details page opens.



2 Click inside the box labeled Integrations. The Service Integrations page opens listing all the integrations and product add-ons your organization has purchased.



3 Click Enable <integration or product name> next to the integration or product add-on you want to enable.

4 Click yes to confirm the enablement. The enablement process can take several minutes to complete.

5 Click Refresh Page to verify the enablement process and to update the list of enabled integrations and product add-ons that displays on the page.

If successful, the integration or add-on will display on the page and the Enable button will no longer display.