May 2015

Deployment Guide

May 18, 2015

Part Number
E56155-05

Oracle Service Cloud User Guide
Part Number E56153-05
Copyright © 2000, 2015, Oracle Corporation and/or its affiliates. All rights reserved. Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.
This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.
The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.
If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:
U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.
This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.
Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.
Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.
This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.
For legal notices, refer to http://www.oracle.com/us/legal/index.html.

Contents

Chapter 1 **Deploying Oracle Service Cloud** 3
Click-Once deployment 3
Application deployment process. 6
Service pack deployment 7
Auto Upgrade Program 7
Application structure 7
Deploying Oracle Service Cloud to multiple staff members 9
Sharing application files 10
Storing user files on a network drive. 13
Sharing update files 16

1

Deploying Oracle Service Cloud

The Oracle Service Cloud Smart Client is deployed on your staff workstations to provide access to Oracle Service Cloud. Oracle Service Cloud uses Microsoft's Click-Once industry standard technology for deployment of the client application to staff workstations. This provides the following benefits:

- New versions of Oracle Service Cloud can be downloaded without redeploying the client.
- Service packs are applied automatically.
- Workstation administrative permissions are not required for staff members.
- Deployment requires little to no involvement from your IS staff.

Note If you are deploying Oracle Service Cloud in a Citrix environment, contact customer support to discuss your deployment needs by sending email to installer@mailca.custhelp.com.

Click-Once deployment

When you deploy the smart client, all necessary components and files are automatically downloaded to your workstation (refer to Application deployment process). After this is complete, your staff can immediately log in and begin configuring and customizing your application. To access the same site in the future, you can launch the client by selecting Start menu > All Programs > RightNow > RightNow (<your_site>).

The client application is site-based, meaning that a separate client must be deployed for each site you access. However, a single client application can be used to access all interfaces on a single site. Interfaces are added to the client in the same way the client is deployed. Simply

access the interface's Launch page and click the Install Oracle Service Cloud button (as described in the following procedure), and the deployment tool will add the interface to the Interface drop-down menu on the client's Login window.

Important Before deploying the client application, be sure to review the system requirements (Answer ID 31) and the environmental configuration information (Answer ID 2364) on our support site.

If you are performing a large-scale deployment of Oracle Service Cloud, refer to Deploying Oracle Service Cloud to multiple staff members.

To download the Oracle Service Cloud client and log in

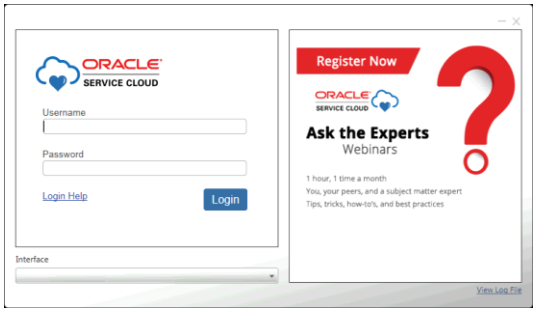
Important Cookies must be enabled on your workstation in order to work in the application.

1 Open your web browser and type the following URL.

```
http://<your_site>.custhelp.com/cgi-bin/<your_interface>.cfg/php/
admin/launch.php
```

2 Click Install Oracle Service Cloud. A security message warns you that the application should not be installed unless you know that it is from a trusted source.

3 Click Install. Once Oracle Service Cloud downloads to your workstation, the Login window opens.



Note To view all deployment files and processes, click View Log File. Refer to Application structure.

You can configure several login options for your application, including login help and Login window customizations. Other login options can help you control and track login behavior.

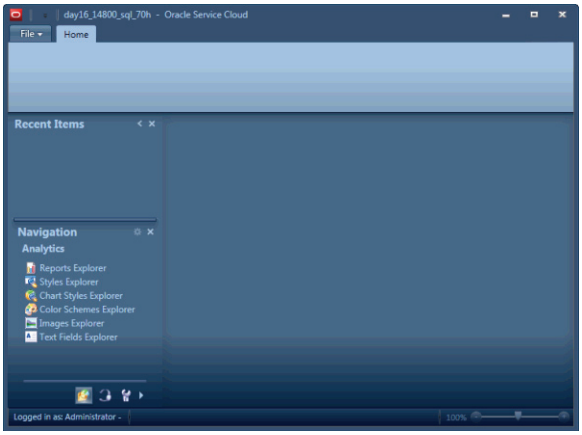
4 Type `administrator` in the Username field. You must enter this user name the first time.

5 Type the password assigned when your site was created. After logging in the first time, you must change your password.

User names and passwords are case sensitive. Keep this in mind as you add staff accounts.

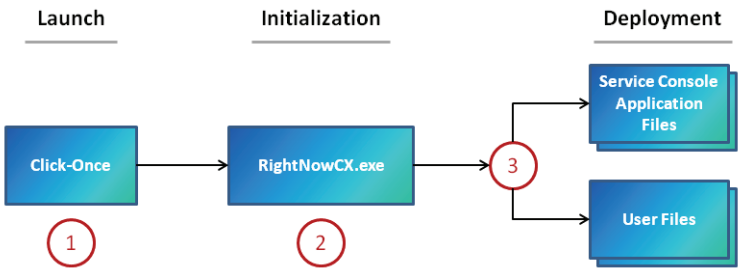
Tip The Interface field displays the name of the interface from which you launched the installer. This drop-down menu will also contain the names of any additional interfaces you install for this site, beginning with the first interface installed.

6 Click Login. The Service Console opens after the system updates and loads all necessary support files.



Application deployment process

When you deploy Oracle Service Cloud, the following process occurs.



1 Click-Once downloads the Oracle Service Cloud application, verifies that its deployment files are current (updating them if necessary), and launches the application.

2 The application prompts you to log in and verifies the credentials you enter.

3 The application deploys the appropriate version application and user files and initializes the smart client. You are now logged in to Oracle Service Cloud.

After Oracle Service Cloud is deployed to your workstation, you can access it in the future by selecting Start menu > All Programs > RightNow > RightNow (<your_site>).

Important Each time you start the application, the Click-Once function will make sure Oracle Service Cloud is current, downloading new files and libraries as needed to keep your deployment up-to-date with each release. For this reason, there is no need to uninstall and reinstall the application following an upgrade.

When logging in after an upgrade, Oracle Service Cloud streamlines the deployment by removing from the workstation any application files (such as program binaries) for versions previously run for the same site. However, user settings and cache files are retained to ensure a smooth transition and consistent experience for staff members.

The deployment process can be customized to ease the load on network bandwidth and disk space during large-scale deployments, operations, and updates of Oracle Service Cloud. For custom deployment options, refer to Deploying Oracle Service Cloud to multiple staff members.

Service pack deployment

Oracle issues service packs to enhance the product release cycle of Oracle Service Cloud. Six iterations are delivered on a regular schedule following the general availability of each major quarterly release. Oracle's automated service pack deployment process provides a simplified change management methodology, promptly delivering code and performance improvements without the need to perform a full upgrade. Service pack updates are deployed using a background process that requires no involvement from your IS team, minimizes impact on your network bandwidth, and is seamless to customers and staff members. For more about service pack deployment, refer to Answer ID 2525 on our support site.

Auto Upgrade Program

The Auto Upgrade Program is for organizations that want the latest version of Oracle Service Cloud by upgrading to each new quarterly release. By upgrading automatically, you get access to the latest features of Oracle Service Cloud while streamlining the upgrade process.

Sites that use standard product functionality and configuration options qualify for the Auto Upgrade Program. Sites that use customizations can qualify for the Auto Upgrade Program if the custom capability is built within the Connect APIs. To see if your site qualifies, contact your Oracle technical migration manager or account manager for a review of your implementation.

After your site is enrolled in the Auto Upgrade Program, an upgrade will be initiated for the site each quarter. An upgrade site and cutover date will be automatically generated, with notifications to your organization sent through an incident generated on our support site. The upgrade site will be available for you to test before cutover. You can change the upgrade cutover date if necessary. Any questions or problems during testing can be reported to customer support, which will be available to assist you during each upgrade cycle.

Starting with the May 2014 release, new sites are automatically enrolled in the Auto Upgrade Program. For more information, refer to Answer ID 6409 on our support site.

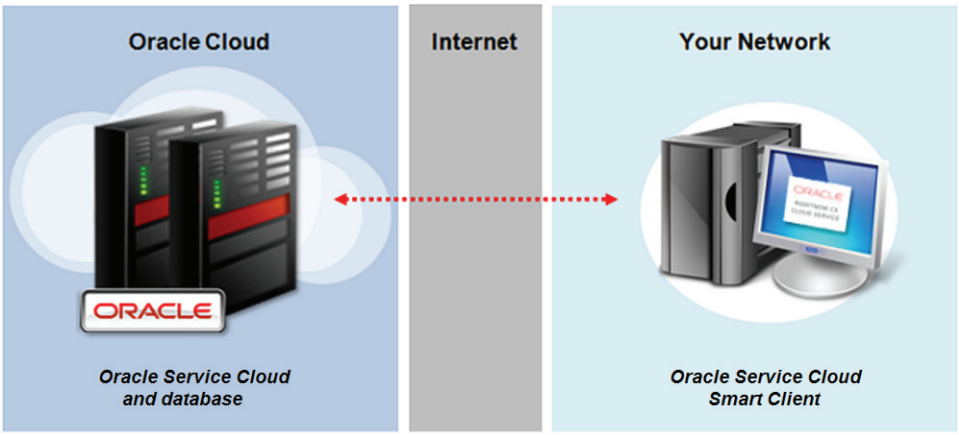
Application structure

Becoming familiar with the application's file structure can be helpful when considering custom deployment options or troubleshooting problems. The following overview describes the smart client directory structure and provides brief definitions of the major files and directories.

When Oracle Service Cloud is fully deployed to a workstation, the Click-Once deployment tool creates the following directories and files in the *%USERPROFILE%\AppData\Local\Apps\2.0* directory.

- <Alphanumeric string>—Contains client executables, cached libraries, and manifest files.
- *Data*—Contains user-specific settings and cache files.

In addition, a set of application resources is downloaded to the Windows user profile of each staff member. By default, these are placed in the *%APPDATA%\RightNow_Technologies\<your_site>\<version>* directory.



These resources fall into the following three categories.

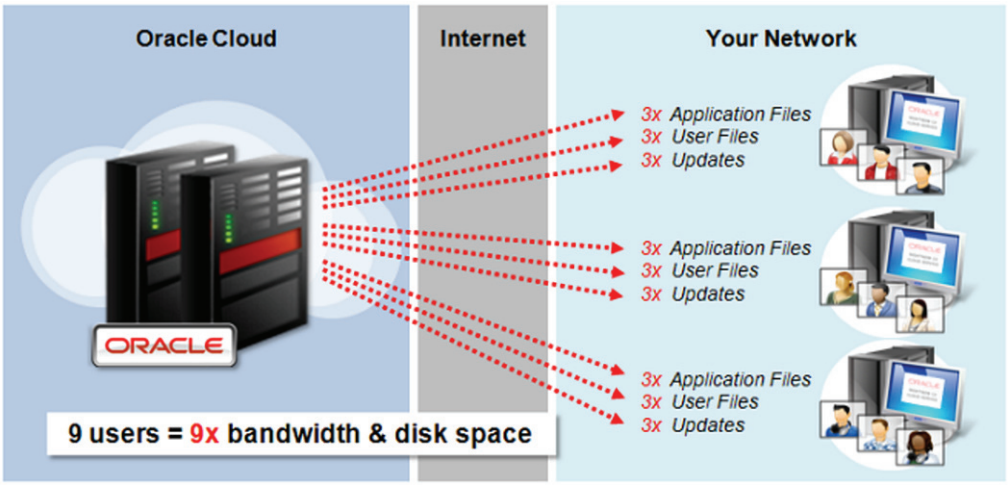
- **Application files**—The binary (.dll) and client files that comprise the extracted application. Upon deployment, these files are downloaded to the *<your_site>\<version>* directory and two subdirectories, *AddInPipeline* (containing add-in libraries) and *RN_COM* (containing the Redemption library used for Outlook integration).
- **User files**—The user-specific files written and used by the application, including user settings, downloaded file attachments, cache files, message base strings, and any add-ins to which the staff member has access. The user files are placed in the *<your_site>\<version>\Users* subdirectory.
- **Updates directory**—Each time Oracle Service Cloud starts, it checks Oracle's cloud servers to see if there are new versions of the application files available, such as those provided by a service pack release. When an update is found, it is automatically downloaded to the *<your_site>\<version>\Updates* subdirectory as a zip file. The updated files are then extracted and moved to the application files location. The zip file and directory are removed following the update.

Note For custom deployment options, refer to Deploying Oracle Service Cloud to multiple staff members.

All deployment files and processes are logged in a time-stamped file called <yyyy.MM.dd.HHmm.ssffff>.log.txt, found in the <*your_site*>*logs* directory. The log for the current session can also be accessed by clicking View Log File on the Login window. Log files are saved for seven days following deployment and are then automatically deleted to conserve disk space.

Deploying Oracle Service Cloud to multiple staff members

When deploying Oracle Service Cloud to a large team, it is important to consider the impact of the deployment process on your network resources. When each staff member initially logs in to the application, client files and libraries that support the application's activity are downloaded to the workstation (refer to Application structure). Depending on the number of staff members and workstations, these individual downloads can consume significant bandwidth and disk space.



To reduce the impact of deployments and software updates on your resources, the application provides three custom deployment options. These settings allow for great flexibility and efficiency of scale when deploying Oracle Service Cloud to large numbers of workstations. All three options can be used together to dramatically lower the use of the local hard drive on agent workstations.

Important A few basic distribution items such as lock, logging, and settings files will always be written to the Windows profile directory. This occurs before agent login and therefore cannot be redirected to a custom location through configuration of the application. If you want to prevent any client files from being written to the workstation hard drive, you must implement Windows redirected profiles.

To greatly reduce the resources required to complete a large-scale deployment, we recommend the following process.

Step 1—Log in to Oracle Service Cloud and define one or more custom deployment options, based on resource availability.

- Sharing application files
- Storing user files on a network drive
- Sharing update files

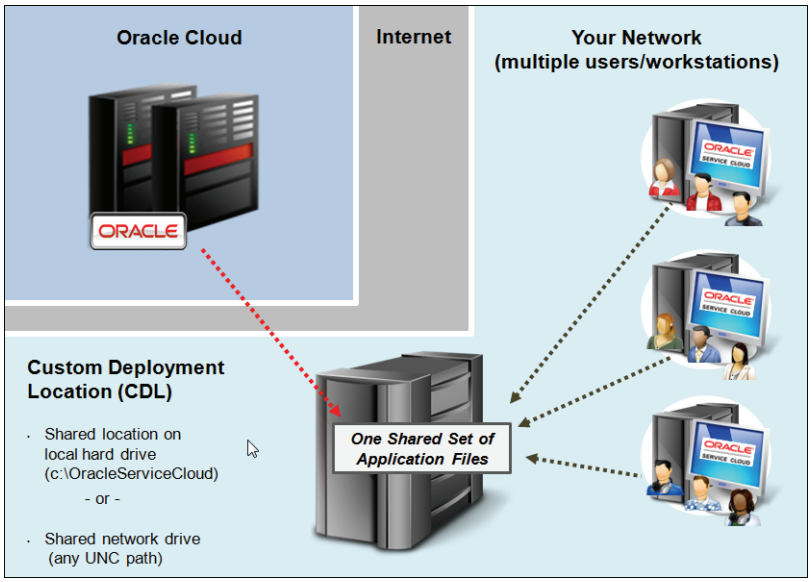
Step 2—Using the Click-Once deployment tool, deploy the application to one workstation. Refer to Click-Once deployment. This will download the deployment files to the custom locations you have defined.

Step 3—Complete the deployment by instructing all staff members to log in. The deployment process on each workstation will access the files from the custom locations, resulting in a much smaller resource impact than using the standard deployment procedure.

Sharing application files

When multiple staff share a single workstation, a full set of application files is placed in the Windows user profile of each staff member. These application files are identical for all staff members, as they do not include personal settings. To save disk space and avoid unnecessary redundancies, you can define a custom deployment location (CDL) to serve a single set of application files to multiple staff members. This location can be a directory on the workstation itself, or any path in universal naming convention (UNC) format.

When this option is enabled, the full set of application files is downloaded only once from the Oracle servers to the location you define, conserving bandwidth. This set of files can then be shared from the custom location by multiple staff members, conserving disk space. Even greater savings can be achieved when you store this set of files on a network drive, allowing it to be shared by staff members across multiple workstations.



You can define a CDL for your entire site, for specific profiles, or both. If both are defined, the location defined in the profile will override the location defined for the site for all staff members who share that profile.

To define a custom deployment location for a site

Set the CUSTOM_DEPLOYMENT_LOCATION configuration setting to the location you want. Refer to the online documentation.

Note If your site contains multiple interfaces, this setting must be consistent for all interfaces.

To define a custom deployment location for a profile

1 Log in to Oracle Service Cloud on an administrator's workstation.

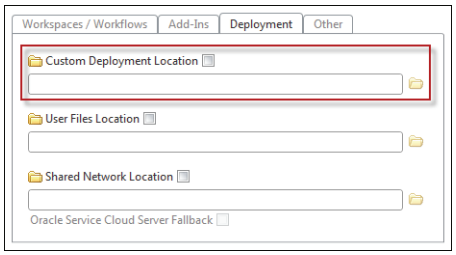
2 Click the Configuration button on the navigation pane.

3 Double-click Profiles under Staff Management. The report opens on the content pane, listing the profiles created for your site.

4 Double-click a profile to edit it. The Profiles editor opens.

5 Click the Deployment tab to display custom deployment settings.

6 Select the Custom Deployment Location check box.



7 Click the Browse button to the right of the field. The Browse for Folder window opens.

Tip As an alternative to browsing for a location, you can click the text field and type the path you want. This setting supports any UNC path or local directory name, such as C:\OracleServiceCloud.

8 Select a location for the custom deployment directory that is outside of the profile directory.

Or

Click the Make New Folder button to create a folder.

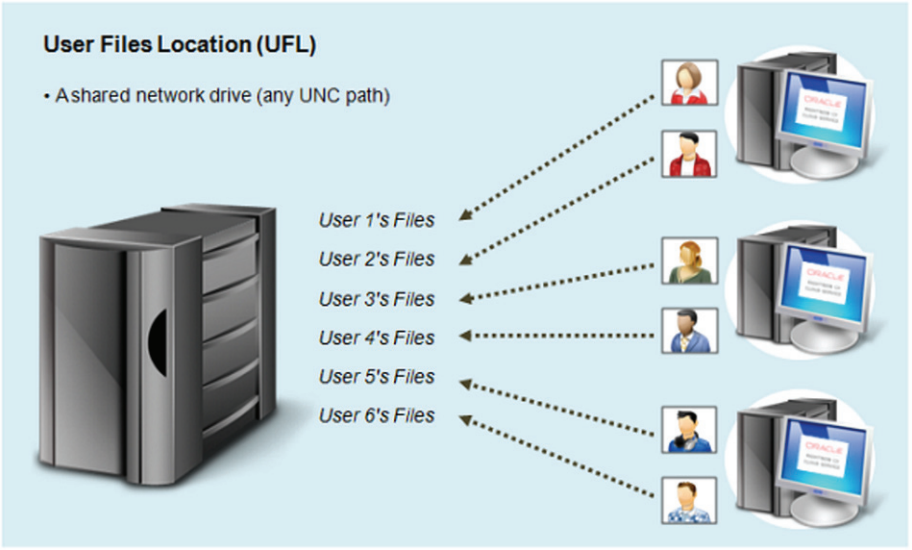
Important Staff members associated with the profile must have permission to create the directory you define (if it does not yet exist) as well as the ability to write and execute files in that directory. If a staff member does not have these permissions, the deployment tool will cease deployment of the files and prompt the staff member to contact an administrator to resolve the problem.

9 Click the OK button to close the window.

10 Click the Save and Close button to save your changes.

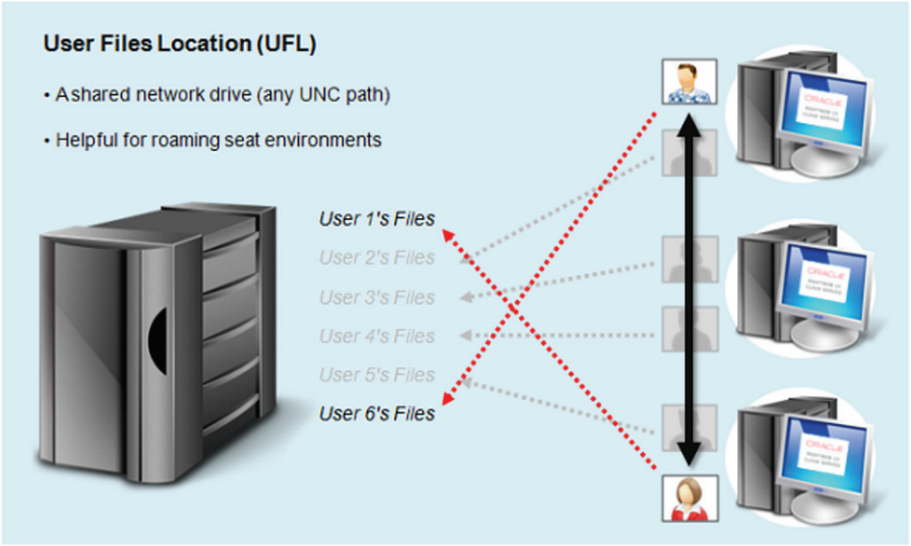
Storing user files on a network drive

When deploying to multiple staff members and workstations, you can define a custom user files location (UFL) for storing private user files that are used to run the Service Console. By default, these files are stored within each staff member's Windows profile. With this option, you can redirect them to a network drive.



Caution When specifying a shared network location for user files, make sure the location you define has adequate resources to serve these files efficiently to all of your staff members. Because these files support user processes in the application, they must be served efficiently in order to avoid system latency.

This option is also useful if your staff members roam among different workstations. When a UFL is defined, each staff member will access a single set of user files regardless of what workstation is used.



You can define a UFL for your entire site, for specific profiles, or both. If both are defined, the location defined in the profile will override the location defined for the site for all staff members who share that profile.

To define a user files location for a site

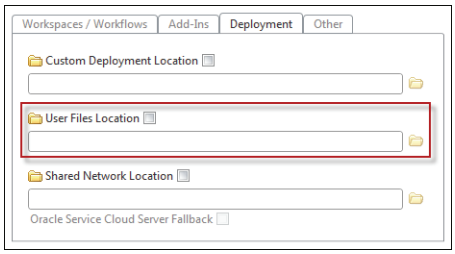
Set the USER_FILES_LOCATION configuration setting to the location you want. Refer to the online documentation.

Note If your site contains multiple interfaces, this setting must be consistent for all interfaces.

To define a user files location for a profile

1. Log in to Oracle Service Cloud on an administrator's workstation.
2. Click the Configuration button on the navigation pane.
3. Double-click Profiles under Staff Management. The report opens on the content pane, listing the profiles created for your site.
4. Double-click a profile to edit it. The Profiles editor opens.
5. Click the Deployment tab to display custom deployment settings.

6 Select the User Files Location check box.



7 Click the Browse button to the right of the field. The Browse for Folder window opens.

Tip As an alternative to browsing for a location, you can click the text field and type the path you want. This setting supports any UNC path.

8 Select a location for the user files directory, generally somewhere inside the staff member's profile directory.

Or

Click the Make New Folder button to create a folder.

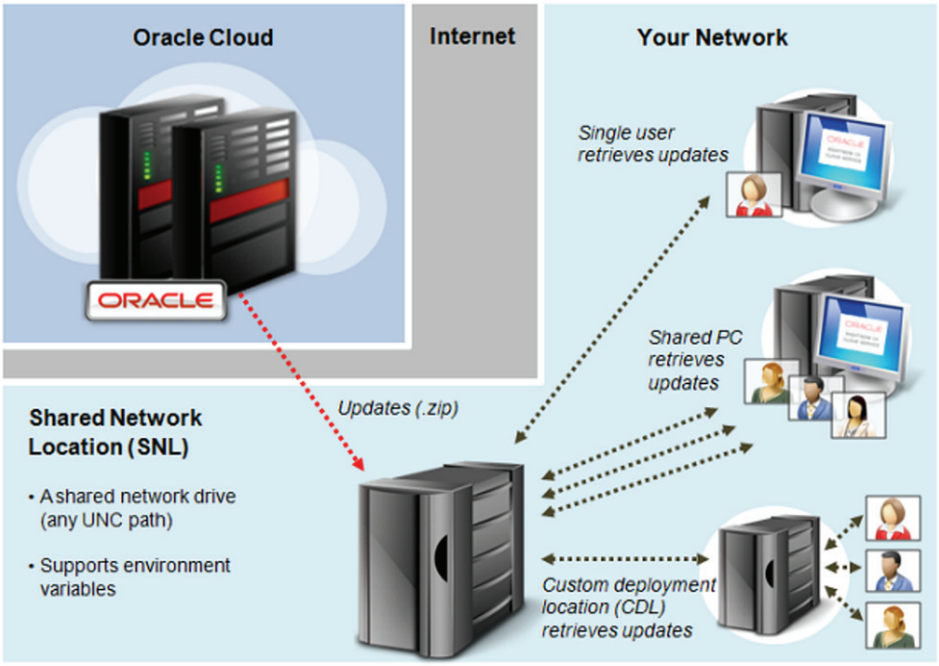
Important Staff members associated with the profile must have permission to create the directory you define (if it does not yet exist) as well as the ability to write and execute files in that directory. If a staff member does not have these permissions, the deployment tool will cease deployment of the files and prompt the staff member to contact an administrator to resolve the problem.

9 Click the OK button to close the window.

10 Click the Save and Close button to save your changes.

Sharing update files

To reduce the bandwidth and disk space required for application updates, you can define a shared network location (SNL) for storing and applying updates. This option can greatly reduce the impact of updating multiple workstations by locally mirroring the update content from the Oracle host servers. The first client to detect an available update will download the zip file to the location you define and extract the contents to its application files location. The zip file is then retained so it can be extracted by the remaining clients upon subsequent logins.



Note By default, updates are automatically downloaded to the *Updates* subdirectory of the application files location. For this reason, if a custom deployment location (CDL) has been specified (refer to Sharing application files), update files will already be shared from that location's *Updates* subdirectory just as they would be if the same location were defined in this setting.

However, you can still use this setting to define a different location to store updates if you prefer to do so. For example, if the CDL you have defined is on the workstation hard drive, you can still reduce resource impact by downloading updates to a shared network location.

You can also specify the protocol used to perform the updates, and enable the Oracle servers as a fallback resource should the location you define become unavailable, such as during server maintenance.

You can define an SNL for your entire site, for specific profiles, or both. If both are defined, the location defined in the profile will override the location defined for the site for all staff members who share that profile.

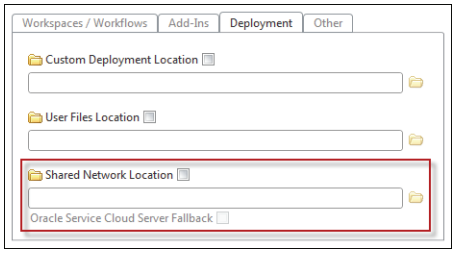
To define a shared update files location for a site

1. Set the SHARED_NETWORK_LOCATION configuration setting to the location you want. Refer to the online documentation.
2. To enable the Oracle servers as a fallback resource should the location you define become unavailable, set the RNT_SERVER_FALLBACK configuration setting to Yes.

Note If your site contains multiple interfaces, these settings must be consistent for all interfaces.

To define a shared update files location for a profile

1. Log in to Oracle Service Cloud on an administrator's workstation.
2. Click the Configuration button on the navigation pane.
3. Double-click Profiles under Staff Management. The report opens on the content pane, listing the profiles created for your site.
4. Double-click a profile to edit it. The Profiles editor opens.
5. Click the Deployment tab to display custom deployment settings.
6. Select the Shared Network Location check box.



7 Click the Browse button to the right of the field. The Browse for Folder window opens.

Tip As an alternative to browsing for a location, you can click the text field and type the path you want. This setting supports any UNC path.

8 Select a shared directory on the network.

Or

Click the Make New Folder button to create a folder.

Important Staff members associated with the profile must have permission to create the directory you define (if it does not yet exist) as well as the ability to write and execute files in that directory. If a staff member does not have these permissions, the deployment tool will cease deployment of the files and prompt the staff member to contact an administrator to resolve the problem.

9 Click the OK button to close the window.

10 To obtain update files from the Oracle servers as a fallback in the event the network location is inaccessible, select the Oracle Service Cloud Server Fallback check box.

11 Click the Save and Close button to save your changes.