

# Oracle® Cloud

## Create Activities in Oracle Field Service for Oracle ERP Cloud Work Orders



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# Preface

This document describes how to install, configure, and run this recipe in Oracle Integration 3.

## Topics:

- [Documentation Accessibility](#)
- [Diversity and Inclusion](#)
- [Related Resources](#)
- [Conventions](#)

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## Related Resources

For more information, see these Oracle resources:

- Oracle Integration documentation in the Oracle Cloud Library on the Oracle Help Center.
- Oracle Cloud at <http://cloud.oracle.com>.

## Conventions

The following text conventions are used in this document.

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.

<b>Convention</b>	<b>Meaning</b>
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

# 1

## About This Recipe

Use this recipe to create corresponding activities in Oracle Field Service when maintenance work orders are created in Oracle ERP Cloud.

### Note:

This recipe is available as **Oracle ERP Cloud — Oracle Field Service | Create Activities for Work Orders** in the Integration Store. Oracle provides this recipe as a sample only. The recipe is meant only for guidance, and is not warranted to be error-free. No support is provided for this recipe.

## Overview

This is an application-driven recipe that creates an activity in Oracle Field Service whenever a maintenance work order is created in Oracle ERP Cloud.

To use the recipe, you must install the recipe and configure the connections and other resources within it. When a new maintenance work order is created in the Oracle ERP Cloud instance, the recipe is triggered, and it creates a corresponding activity in Oracle Field Service. Basic data is synchronized between the two platforms.

## System and Access Requirements

- Oracle Integration, Version 21.2.1.0.0 or higher
- Oracle ERP Cloud
- An account on Oracle ERP Cloud with the Administrator role
- Oracle Field Service
- An account on Oracle Field Service with the Administrator role

# 2

## Before You Install the Recipe

You must perform the following configuration tasks on your Oracle ERP Cloud and Oracle Field Service instances in order to successfully connect to these external systems using Oracle Integration and create activities for maintenance work orders.

### Configure Oracle Field Service

Retrieve the client ID and secret from Oracle Field Service by adding an application.

To add an application:

1. Log in to an Oracle Field Service instance.
2. In the top-left corner, click the hamburger menu, then click **Configuration**.
3. On the Configuration page, under **Subsystems**, click **Applications**.
4. Click **Add Application**.
5. Enter the **Application Name** and **Application ID**, give the required API access. See [Authorize Access to APIs](#).
6. Click **Submit**.
7. Select the type of token service for the registered client application from the **Token service** drop-down list.  
By default, the type of token service is **Oracle Field Service**.
8. Select the authentication settings as **Authenticate using Client ID/Client Secret**.
9. Click **Show Client ID and Client secret** to copy them for configuring the connection in Oracle Integration.
10. Click **Save**.

### Configure Oracle ERP Cloud

To access the Oracle ERP Cloud instance from Oracle Integration, you'll require a separate user account on Oracle ERP Cloud.

Also, create the following two segments in the **Work Order Header** flexfield:

- `senttoofsc`: Indicates if the work order details are successfully sent to the Oracle Field Service instance.
- `OFSC SYNC STATUS`: Indicates if the new activity records are successfully created in the Oracle Field Service instance.

Log in to your Oracle ERP Cloud instance as an **Administrator** and perform the following tasks.

1. Create a user account for Oracle Integration. Make a note of the user name and password you set for the account. You'll use the credentials of this user account to connect to Oracle ERP Cloud from Oracle Integration.

2. Create a Fusion Applications user to use in the Oracle ERP Cloud connection, and assign it the **Integration Specialist** role.

This is the user you will specify in the ERP connection to connect to Oracle ERP Cloud.

For more information, see Assign Required Roles to an Integration User in *Using the Oracle ERP Cloud Adapter with Oracle Integration 3*.

3. Update the **Work Order Header** flexfield with two new segments, `senttoofsc` and `OFSC SYNC STATUS`.
  - a. In the top-right corner of the Oracle ERP Cloud home page, click the profile image, then select **Setup and Maintenance**.
  - b. On the right, click **Task**, and select **Search**.
  - c. In the Search field, enter `Manage Descriptive Flexfields`, and then click **Search**.
  - d. From the search results, select **Manage Descriptive Flexfields**.
  - e. On the Manage Descriptive Flexfields page, select **Work Orders** from the Module drop-down menu, then click **Search**.
  - f. From the search results, select **Work Order Header** and click **Edit**.
  - g. On the Edit Descriptive Flexfield page, click the **Create** icon in the Global Segments section. See [Create Global Segments](#).
  - h. On the Create Segment page, enter the name for the segment as `senttoofsc`, and enter other values for the segment as required.
  - i. Repeat steps 3g and 3h to create another segment named `OFSC SYNC STATUS`.
  - j. Click **Save and Close**.
4. Deploy the descriptive flexfield. See [Deploy Descriptive Flexfields](#).

# 3

## Install and Configure the Recipe

On your Oracle Integration instance, install the recipe to deploy and configure the integration and associated resources.

1. On the Oracle Integration Home page, in the **Get started** section, click **Browse store**.
2. Find the recipe you want to install, then click **Get**.

A message confirms that the recipe was successfully installed, and the recipe card shows **In use**.

3. Click **Configure**  on the recipe to configure its resources.

The project workspace opens, displaying all the resources of the recipe. Configure the following resources before you activate and run the recipe.

### Configure the Oracle Field Service Connection

1. In the Connections section, click the connection name.
2. In the Properties section, enter the following details:

Field	Information to Enter
<b>Field Service Cloud API URL</b>	Enter the URL of your Oracle Field Service instance. See <a href="#">Configure Oracle Field Service</a> .
<b>Instance ID</b>	Enter the ID of your Oracle Field Service instance. For example, <code>ofsc-xyz.test</code> .

3. In the Security section, enter the following details:

Field	Information to Enter
<b>Security Policy</b>	Select <b>Client Credentials</b> .
<b>Client Id</b>	Enter the client ID obtained from your Oracle Field Service instance. See <a href="#">Configure Oracle Field Service</a> .
<b>Client Secret</b>	Enter the client secret obtained from your Oracle Field Service instance.

4. Click **Save**. If prompted, click **Save** again.
5. Click **Test** to ensure that your connection is successfully configured. In the resulting dialog, click **Test** again.

A message confirms if your test is successful.

6. To return to the project workspace, click **Go back** .

### Configure the Oracle ERP Cloud Connection

1. In the Connections section, click the connection name.

2. In the Properties section, enter the Oracle ERP Cloud host name. For example: `https://your_domain_name.fa.DC.oraclecloud.com`.
3. In the Security section, enter the following details:

Field	Information to Enter
<b>Security Policy</b>	Select <b>Username Password Token</b> .
<b>Username</b>	Enter the username of the account created for Oracle Integration on the Oracle ERP Cloud instance. See <a href="#">Configure Oracle ERP Cloud</a> .
<b>Password</b>	Enter the password of the account created for Oracle Integration on the Oracle ERP Cloud instance.

4. Click **Save**. If prompted, click **Save** again.
5. Click **Test** to ensure that your connection is successfully configured. In the resulting dialog, click **Test** again.  
A message confirms if your test is successful.
6. To return to the project workspace, click **Go back** .

## Configure the Lookup Table

Edit the **ORACLE-BRT-OFSC\_CONFIG** lookup table to map **MntWorkOrderDefinitionCode** in Oracle ERP Cloud with the corresponding **OFSCActivityType** and **OFSCResource** in Oracle Field Service.

1. In the Lookups section, click the lookup name.
2. Map the maintenance work order definition codes in Oracle ERP Cloud with the corresponding activity type and resource in Oracle Field Service.
3. Click **Save**. If prompted, click **Save** again.
4. To return to the project workspace, click **Go back** .

# 4

## Activate and Run the Recipe

After you've configured the connections and other resources, you can activate and run the recipe.

1. In the project workspace, click **Activate**. In the Activate project panel, with the default project deployment selected, choose an appropriate tracing option, then click **Activate**.

A message confirms that the integration has been activated. Refresh the page to view the updated status of the integration.

2. Run the recipe.

Create a maintenance work order in Oracle ERP Cloud.

- a. Log in to your Oracle ERP Cloud instance.
- b. Under Supply Chain Execution, click **Maintenance Management**.
- c. Click the **Task** icon on the right and select **Manage Maintenance Work Orders**.
- d. On the Maintenance Work Orders page, click **Create**.
- e. In the Create Maintenance Work Order window, enter the details of the new work order and click **Save and Close**.

You've now successfully triggered the integration flow of the recipe.

When you create a maintenance work order in Oracle ERP Cloud, the **Oracle ERP FSC MWorkOrder To Activity Create Sync** integration flow gets triggered and a corresponding activity is created in the Oracle Field Service instance.

3. Monitor the running of the integration flow in Oracle Integration.
  - a. In the project workspace, click **Observe**. You'll see the integration flow being triggered and running successfully.
  - b. To manage errors in your project, see [Manage Errors in a Project](#).
4. Check for the new activities created in your Oracle Field Service instance.
  - a. Log in to the Oracle Field Service instance.
  - b. Select **Dispatch Console** in the left navigation pane.
  - c. Check if a corresponding activity is created for the maintenance work order created in Oracle ERP Cloud.

### Related Documentation

- [Using the Oracle Field Service Cloud Adapter with Oracle Integration 3](#)
- [Using the Oracle ERP Cloud Adapter with Oracle Integration 3](#)