Oracle® Cloud

Sync Oracle Siebel Employees with Oracle Field Service Technicians

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Contents

Preface

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

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Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc`.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info` or visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs` if you are hearing impaired.

Diversity and Inclusion

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

Related Resources

For more information, see these Oracle resources:

- Oracle Integration documentation on the Oracle Help Center.
- Oracle Cloud at `http://cloud.oracle.com`.

Conventions

The following text conventions are used in this document.

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

Convention	Meaning
italic	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.

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About This Recipe

Use this recipe to synchronize Oracle Siebel employees with Oracle Field Service technicians.

> **✏ Note:**
>
> This recipe is available as **Oracle Siebel — Oracle Field Service | Sync Employees and Technicians** in Oracle Integration. 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 recipe creates or updates a technician in Oracle Field Service when an employee is created or updated in Oracle Siebel.

To use the recipe, you must install the recipe and configure connections and other resources within it. When an employee is created or updated in Oracle Siebel, a Siebel workflow event is triggered. This in turn triggers the main integration flow of the recipe (**Oracle Siebel OFS Employee Sync**) which had subscribed to Siebel workflow events. Subsequently, the main integration flow of the recipe calls the helper integration flow (**Oracle Siebel OFS Employee Sync Helper**) which then creates or updates a corresponding technician in Oracle Field Service. Basic data such as name, address, contact details are synchronized between Oracle Siebel and Oracle Field Service.

System and Access Requirements

- Oracle Integration, Version 24.06 or higher
- Oracle Siebel
- Oracle Field Service
- An account on Oracle Siebel with the Administrator role
- An account on Oracle Field Service with the Administrator role

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Before You Install the Recipe

You must perform the following configuration tasks on your Oracle Siebel instance and Oracle Field Service instance in order to connect to these external systems using Oracle Integration and successfully synchronize Oracle Siebel employees with Oracle Field Service technicians.

Configure Oracle Siebel

Perform general configuration tasks for creating a connection. See Prerequisites for Creating a Connection.

Get the Swagger JSON file from Oracle Integration and perform the following tasks:

1. Log in to the Oracle Siebel instance.
2. Import the Swagger JSON file into Siebel via the Web Service Wizard (Siebel Web Tools).
3. Navigate to **Sitemap**, then **Administration - Web Services**, and then **Outbound REST Services** to verify the proxy business service.
4. Under **Siebel Objects** and then **Integration Objects**, verify any XML IO generated.
5. Create the input payload.
6. Provide security parameters such as user id, password and authentication type.
7. Call the proxy business service by providing the payload.

For more information, see the Siebel Rest API guide.

Configure Oracle Field Service

Perform the general configuration tasks for creating a connection. See Prerequisites for Creating a Connection.

In addition, you have to create skills in Oracle Field Service. These skills must correspond to skills in Oracle Siebel. All skills available in Oracle Siebel are created with the pattern `ItemTypeName_SkillName`. For example, if the skill category is `Language` and skill name is `english`, you need to create `Language_en` in Oracle Field Service.

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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 SBL-OFS REST Connection

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

2. 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.

3. Click **Save**. If prompted, click **Save** again.

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

Configure the Oracle SBL-OFS OFSC Connection

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

2. In the Properties section, enter the following details:

Field	Information to Enter
Field Service Cloud API URL	Enter the URL of your Oracle Field Service instance.
Instance ID	Enter the instance ID.

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

Field	Information to Enter
Security policy	Select **Client Credentials**.
Client Id	Enter the client Id.
Client Secret	Enter the client secret.

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 SBL-OFS REST OFS Connection

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

2. In the Properties section, enter the following details:

Field	Information to Enter
Connection Type	Select REST API Base URL.
Connection URL	Enter the URL of your Oracle Field Service instance. For example: `https://<serviceinstanceid>.etadirect.com`

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

| Field	Information to Enter
Security policy	Select **Basic Authentication**.
Username	Enter the username of the account created for Oracle Integration on the Oracle Field Service instance. See Configure Oracle Field Service.
Password	Enter the password of the account created for Oracle Integration on the 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** ◁.

Update Integration Properties

Update the integration properties for the **Oracle Siebel OFS Employee Sync Helper** integration flow.

1. In the Integrations section, click **Actions** ⋯ on the integration flow, then select **Update property values**.

2. In the Update property values panel, update the integration properties with appropriate values.

    a. **FromAddress**: This property holds the value of the email address from which error or failure notifications are sent. You can get the value to enter by navigating to **Settings**, then **Integrations**, and then **Notifications**.

    b. **ToAddress**: This property holds the value of the email address to which error or failure notifications are sent. Enter an email of your choice.

    c. **ParentResouceID**: This property holds the root organization English name. Get the value to enter by navigating to **Configuration** and then **Organizations**.

    d. **BucketResourceLabel**: This property holds the label value corresponding to the bucket. Get the value to enter by navigating to **Configuration** and then **Resource Types**.

    e. **BucketLanguageCode**: This property holds the language code of the bucket. For example, if the default language is English then enter `en`.

    f. **TechnicianResourceLabel**: This property holds the label corresponding to technician. Get the value to enter by navigating to **Configuration** and then **Resource Types**.

3. Click **Submit**.

A message confirms that the integration properties have been updated successfully.

You have to update the integration properties of the **Oracle Siebel OFS Employee Sync** integration flow after activating the recipe. See Activate and Run the Recipe.

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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. Update the following properties for the **Oracle Siebel OFS Employee Sync** integration flow.

    *   **FromAddress**: This property holds the value of the email address from which error or failure notifications are sent. You can get the value to enter by navigating to **Settings**, then **Integrations**, and then **Notifications**.

    *   **ToAddress**: This property holds the value of the email address to which error or failure notifications are sent. Enter an email of your choice.

3. Run the recipe.

    Create an employee in Oracle Siebel. This triggers the main integration flow **Oracle Siebel OFS Employee Sync** to run which in turn calls the helper integration flow **Oracle Siebel OFS Employee Sync Helper**. The helper integration flow is submitted successfully for execution.

4. 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.

5. Log in to Oracle Field Service and check if a corresponding technician has been created. Verify if basic data is synchronized between the Oracle Siebel employee and the Oracle Field Service technician.

Related Documentation

*   *Using the Oracle Siebel Adapter with Oracle Integration 3*
*   *Using the Oracle Field Service Cloud Adapter with Oracle Integration 3*