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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- Community: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- Guides and Videos: Go to the Oracle Help Center to find guides and videos.
- Training: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>boldface</td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td>monospace</td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 About This Guide

Audience and Scope

This guide outlines the implementation and configuration steps required to develop, configure, manage, and administer Digital Customer Service in Oracle Engagement Cloud. To set up and work with the additional features of Oracle Engagement Cloud, see Oracle Sales Cloud documentation on Oracle Help Center at https://docs.oracle.com.

This implementation guide is designed to be used as a starting point that shows how Digital Customer Service in Oracle Engagement Cloud can be developed and implemented using the Oracle Visual Builder Cloud Service. An implementor can use the documented development and configuration information in this guide to successfully deploy Digital Customer Service.

Each implementation of Oracle Engagement Cloud is unique, and leads to the development of customer-specific applications that support their unique business requirements.

Related Guides

To understand more about the information covered in this guide, refer to the list of guides in the following table.

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Cloud Using Oracle Visual Builder Cloud Service</td>
<td>Describes how to use a web-based visual development tool to create and publish custom web and mobile applications that can integrate business objects and REST services to extend SaaS services.</td>
</tr>
<tr>
<td>Oracle Engagement Cloud Using Service in Engagement Cloud</td>
<td>Contains information to help service managers, service personnel, and other service end users to perform day-to-day business tasks using Oracle Cloud.</td>
</tr>
<tr>
<td>Using Knowledge in Engagement Cloud</td>
<td>Describes how administrators, agents, authors, and other knowledge base contributors can implement and use Knowledge in Engagement Cloud.</td>
</tr>
<tr>
<td>Oracle Engagement Cloud Implementing Service in Engagement Cloud</td>
<td>Describes how to set up Service Request Management for Oracle Engagement Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Getting Started with Your Implementation</td>
<td>Describes your initial Oracle Sales Cloud service implementation procedures, based on a simple sales-force-automation use case.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Sales</td>
<td>Contains conceptual information and procedures needed to implement components and features of Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Securing Sales</td>
<td>Contains information to help setup users and sales administrators configure access to Oracle Sales Cloud functionality and data.</td>
</tr>
</tbody>
</table>
Oracle Sales Cloud Security Reference

Lists the predefined security data that is included in the Sales offering.

Related Topics

- Oracle Help Center
Chapter 2

About Digital Customer Service

Overview of Digital Customer Service

Oracle Digital Customer Service is an offering within Oracle Engagement Cloud that enables you to provide your customer account users self-service access to their service requests and relevant knowledge articles through a web interface.

The Digital Customer Service application user interface can be configured to reflect a company brand. Using Oracle Visual Builder Cloud Service, you apply themes and templates, and include various UI components, depending on your business needs.

Once configured and deployed, your customer account’s users can self-register as Digital Customer Service users. Once the self-registration is complete, Digital Customer Service users can sign in to the Digital Customer Service application UI to communicate with your customer service representatives using a web interface, chatting or cobrowsing.

The following figure provides a general overview of the Digital Customer Service architecture.

---

About Digital Customer Service Terminology

This topic describes terminology related to the Digital Customer Service offering in Oracle Engagement Cloud. Some terminology is related to other software components.

- **Oracle Visual Builder Cloud Service**: A visual development tool for creating applications by dragging and dropping UI components onto a page. You can create business objects and add data to your application. The tools and platform on which the Digital Customer Service components are built are integrated with Oracle Engagement Cloud and the associated APIs. Refer to the related topics that follow for more information about terminology specific to Oracle Visual Builder Cloud Service.

- **Theme**: HTML and Cascading Style Sheet (CSS) files that provide the look and feel of the implementing company’s brand. The theme enables the implementing company to style the application to match branding experience.
• **UI Components**: The items that you place onto a web page that provide key capabilities within a user experience, for example, knowledge search, and results.

• **Business Objects**: The definitions of data objects that enable UI components to interact with Oracle Engagement Cloud APIs.


• **Digital Customer Service Users**: Your customer account users who have successfully self-registered to use the Digital Customer Service application. These users can have a variety of roles.

• **Digital Customer Service Templates**: The available templates you can select while creating your Digital Customer Service application. These application templates include component extensions, themes, and depending on the template, predefined pages and actions.

• **Digital Customer Service Reference Implementation**: This template includes several pages and business components that enable basic support experience including: product browsing, knowledge search, service request creation and management, chat, and self-service user management capabilities for the account administrator. The administrator manages all of the users and roles.

• **Digital Customer Service Starter**: This template is an empty application that makes the Digital Customer Service components available in the component palette of Oracle Visual Builder Cloud Service.

**Related Topics**

• Getting Started with Oracle Visual Builder Cloud Service

### About Digital Customer Service Roles

Digital Customer Service users can be granted different roles. This topic describes the details of the privileges granted with each role.

> **Note:** By default, all users have access to knowledge search and article viewing. This can be configured to limit access to authenticated users through the security configuration within Oracle Visual Builder Cloud Service and the specific application.

#### User

The User role grants the privileges to view and edit service requests created by the user, and to create service requests. Removing this role causes the removal of all privileges. The only way to restore the privileges is to submit a new registration request.

#### Account Manager

The Account Manager role grants the privileges to view and edit all service requests for a specific customer account. Additionally, users with the Account Manager role can create service requests. The user can perform these tasks only on accounts for which they’re the Account Manager.
Account Administrator

The Account Administrator role grants the privileges to view and approve registration requests in the customer account for which they’re the Account Administrator. Additionally, the role permits the user to assign and remove the Account Administrator and Account Manager roles, and remove roles on accounts for which they’re the Account Administrator.

Related Topics

• Managing Self-Service Users
• Oracle Cloud Administrator’s Guide for Oracle Visual Builder Cloud Service

About Technical Compatibility

This topic describes the software versions that are compatible with this release of the Digital Customer Service offering. Digital Customer Service Release 18.2.3 is available with Oracle Engagement Cloud Release 13.18.05 (18B) Use the following software and specified versions with Digital Customer Service Release 18.2.3:

• Oracle Visual Builder Cloud Service 18.2.3

**Note:** Digital Customer Service uses Oracle Engagement Cloud REST APIs through Oracle Visual Builder Cloud Service. For more information, refer to the Oracle API Catalog Cloud reference in the Related Topics.

• Knowledge Management, Chat, Cobrowse, Service Request Management, and Digital Customer Service Administration packaged with Oracle Engagement Cloud Release 13.18.05 (18B)
• Oracle JavaScript Extension Toolkit (Oracle JET)
• Browsers supported by Oracle JET: see the Related Topics that follow.

**Note:** Digital Customer Service is not supported with Symantec Blue Coat Cloud Data Protection Gateway.

Determining the Version of Oracle Engagement Cloud

To determine the version of Oracle Engagement Cloud that you have installed:

1. Sign in to Oracle Engagement Cloud.
2. Select the menu next to the name of the signed-in user.
The **Settings and Actions** menu appears.
3. Click **About This Application**.
The **About This Application** dialog box is displayed. The version number appears after the word **Revision**.

Related Topics

• What platforms are supported by Oracle JET?
• Oracle Software Web Browser Support Policy
• Oracle Visual Builder Cloud Service
• Oracle API Catalog Cloud Service
• Determining Extension Versions
3 Configuring Digital Customer Service for Initial Use

About Initial Digital Customer Service Setup

This topic describes the various initial tasks that you must complete to set up Digital Customer Service initial use.

The tasks outlined in this topic refer to documents later in this chapter. Follow these steps to get your Digital Customer Service application running for initial use:

2. Creating a Service Instance.
3. Configuring Profile Options.
5. Performing Role Synchronization.
7. Setting Up Authentication for Your Application.
10. Setting Up Products, Categories and Knowledge Articles.

Enabling Digital Customer Service

This topic describes how to enable the Digital Customer Service application.

Note: This topic is one of many required for the initial setup of Digital Customer Service. For more information about initial setup tasks required to get started with your Digital Customer Service application, see the related topics that follow.

You must enable Digital Customer Service in Oracle Engagement Cloud to have access to certain profile options and work areas. Once enabled, the following work areas are grouped with the Service icon in Oracle Engagement Cloud:

- Self-Service Users
- Registration Requests

The profile options in the following areas are available after enabling Digital Customer Service:

- Manage Digital Customer Service Account Setup Profile Options
- Manage Digital Customer Service Registration Profile Options

To enable the Digital Customer Service Application:

1. Sign in to Oracle Engagement Cloud as an administrator or a setup user.
2. Navigate to the Setup and Maintenance work area.
3. From the Setup list, select Service.
4. Click the **Change Feature Opt In** link.
5. In the **Service** row, select the **Enable** option.
6. In the **Digital Customer Service** row, select the **Enable** option.
7. Click **Done**.

### Creating a Service Instance

This topic describes how to create a service instance of Oracle Visual Builder Cloud Service and Oracle Digital Customer Service.

**Note:** This topic is one of many required for the initial setup of Digital Customer Service. For more information about initial setup tasks required to get started with your Digital Customer Service application, see the related topics that follow.

When an order is provisioned, an entitlement for a number of service instances is granted. However, you cannot use the service until a service instance is created from the granted entitlements. This topic describes how to create the service instances.

To create the service instances:

   
   a. Sign in to Oracle Cloud.
      
      For information about signing in to Oracle Cloud, see the Signing In to the My Services Application in the Managing and Monitoring Oracle Cloud guide in the Related Topics section.
   b. Click the **Dashboard** icon to open the **My Services Dashboard** page
   c. Select **Create Instance**.
   d. From the **Create Instance** dialog box, click **Create** next to **Visual Builder**.
   e. On the **Create New Application Builder Cloud Service** page, complete the obligatory fields.
      
      **Note:** Verify that the **Association** field contains the name of your CRM instance.
   
   f. Click **Create**.
   g. On the Confirmation dialog, click **Create**.
      
      A confirmation message is displayed.

2. Create the Service instance for Digital Customer Service in Oracle Cloud:
   
   a. Click the **Dashboard** icon to open the **My Services Dashboard** page
   b. Select **Create Instance**.
   c. From the **Create Instance** dialog box, click **Create** next to **Digital Customer Service Instance**.
   d. On the **Create New Digital Customer Service Instance** page, complete the obligatory fields.
      
      **Note:** Verify that the **Association** field contains the name of the Oracle Visual Cloud Builder instance created in Step 1.
   
   e. Click **Create**.
   f. On the Confirmation dialog, click **Create**.
A confirmation message is displayed.

**Related Topics**
- Managing and Monitoring Oracle Cloud

## Configuring Profile Options

This topic describes Digital Customer Service profile options, including configuration instructions.

> **Note:** This topic is one of many required for the initial setup of Digital Customer Service. For more information about initial setup tasks required to get started with your Digital Customer Service application, see the related topics that follow.

The following task lists contain the profile options related to Digital Customer Service:
- Manage Digital Customer Service Registration Profile Options
- Manage Digital Customer Service Account Setup Profile Options

### About Digital Customer Service Registration Profile Options

The following table lists the profile options for Digital Customer Service Registration profile options.

<table>
<thead>
<tr>
<th>Lookup Code</th>
<th>Default Value</th>
<th>Possible Values</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>SVC_CSS_SELF_REGISTRATION</td>
<td>New Or Existing</td>
<td>None</td>
<td>Specifies which contacts can self-register. If Existing is specified, only existing contacts can self-register.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>New Or Existing</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Existing Only</td>
<td></td>
</tr>
<tr>
<td>SVC_CSS_SELF_REG_AUTO_APPROVE</td>
<td>False</td>
<td>True</td>
<td>Enables automatic approval for self-service user registration.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>False</td>
<td></td>
</tr>
<tr>
<td>SVC_CSS_ACCT_ADMIN_APPROVE</td>
<td>True</td>
<td>True</td>
<td>Enables the approval of self-service user registration requests by users with Digital Customer</td>
</tr>
<tr>
<td></td>
<td></td>
<td>False</td>
<td></td>
</tr>
</tbody>
</table>

If SVC_CSS_SELF_REG_AUTO_APPROVE is set to False and SVC_CSS_ACCT_ADMIN_APPROVE is set to True, then the Digital Customer Service Account Administrators can approve user registration requests in the Digital Customer Service Customer user interface. Also Digital Customer Service Administrators can approve registration requests in the Digital Customer Service Administration user interface.
<table>
<thead>
<tr>
<th>Lookup Code</th>
<th>Default Value</th>
<th>Possible Values</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>SVC_CSS_ACCT_KEY_FIELD</td>
<td>OrganizationName</td>
<td>Any field in the Account object</td>
<td>Specifies a valid field name in the Account object.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Note:</strong> You must create an attribute in the account object to be the account key, because the default account key of account name is not secure.</td>
</tr>
<tr>
<td>SVC_CSS_REG_CONT_MAP</td>
<td>PersonFirstName:PersonFirstName</td>
<td>NULL</td>
<td>Specifies name and value pairs that map fields of the Registration View object to the Contact View object. When set to NULL, the same name is expected in both objects.</td>
</tr>
<tr>
<td></td>
<td>PersonLastName:PersonLastName</td>
<td>Any defined value, with a colon separating fields, and commas separating the pairs.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>EmailAddress:EmailAddress</td>
<td>For example, reg_field1:contact_field1 reg_field2:contact_field2</td>
<td></td>
</tr>
<tr>
<td>SVC_CSS_SIGN_IN_ATTR_NAME</td>
<td>EmailAddress</td>
<td>The value of the assigned attribute must be unique.</td>
<td>Specifies the sign-in attribute that users must specify in the Sign In ID field in the Registration View object. This field is used to determine whether the user exists in the Lightweight Directory Access Protocol server.</td>
</tr>
</tbody>
</table>
### Configuring Digital Customer Service for Initial Use

#### About Digital Customer Service Account Setup Profile Options

The following table lists the profile options for Digital Customer Service Account Setup profile options.

<table>
<thead>
<tr>
<th>Lookup Code</th>
<th>Default Value</th>
<th>Possible Values</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SVC_CSS_REG_FLD_CONTACT</strong></td>
<td>EmailAddress</td>
<td>Any field on the Contact object</td>
<td>Specifies the fields to use during the user registration process to determine whether the registering user is an existing contact.</td>
</tr>
<tr>
<td><strong>SVC_CSS_SEND_WELCOME_EMAIL</strong></td>
<td>True</td>
<td>True</td>
<td>Enables sending a welcome email when a new user account is created.</td>
</tr>
<tr>
<td></td>
<td>False</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>SVC_CSS_USER_ROLE_COMMON_NAME</strong></td>
<td>ORA_svc_customer_self_service_user_abstract</td>
<td>A string representing the name of the role that is set up for Customer Self-Service users. Typically, this is a copy of a Customer Self-Service User with additional privileges added.</td>
<td>Specifies the common name of the role granted to newly created Customer Self-Service Users. For more information refer to Assigning Custom Job Roles in the Related Topics.</td>
</tr>
<tr>
<td><strong>SVC_CSS_ACCT_ADMIN_ROLE_COMMON_NAME</strong></td>
<td>ORA_svc_customer_self_service_account_administrator_abstract</td>
<td>A string representing the name of the role that is set up for Customer Self-Service Account Administrator. Typically, this is a copy of a Customer Self-Service Account Administrator with additional privileges added.</td>
<td>Specifies the common name of the role granted to Customer Self-Service Account Administrators. For more information refer to Assigning Custom Job Roles in the Related Topics.</td>
</tr>
<tr>
<td><strong>SVC_CSS_USERCATEGORY</strong></td>
<td>An empty string.</td>
<td>A string.</td>
<td>Specifies the user category that defines the URL to which the self-service user is redirected after a password reset.</td>
</tr>
<tr>
<td><strong>SVC_CSS_IMP_SIGN_IN_ATTR_NAME</strong></td>
<td>PrimaryEmailAddress</td>
<td>Any field on the Contact object</td>
<td>Specifies a field in the Contact object to be used as the sign-in attribute when importing data into the Self-Service Roles object. The field name is case sensitive.</td>
</tr>
</tbody>
</table>

**Oracle Engagement Cloud**

Implementing Digital Customer Service in Engagement Cloud

Chapter 3

Configuring Digital Customer Service for Initial Use
Setting Digital Customer Service Profile Options

This topic describes how to set profile options for Digital Customer Service. The profile options specific to Digital Customer Service are found in two task areas: Manage Digital Customer Service Registration Profile Options and Manage Digital Customer Service Account Setup Profile Options.

To find and set the Digital Customer Service profile options:

1. Sign in to Oracle Engagement Cloud as administrator or a setup user.
2. Navigate to the Setup and Maintenance work area.
3. From the Setup list, select Service.
5. In the Task list, click one of the two following tasks:
   - Manage Digital Customer Service Registration Profile Options
   - Manage Digital Customer Service Account Setup Profile Options
6. Click the profile option that you want to modify, then click the pencil icon.
7. Set the profile option value as needed.

Assigning Custom Job Roles

This topic describes how to assign custom job roles for use in Digital Customer Service.

**Note:** This topic is one of many required for the initial setup of Digital Customer Service. For more information about initial setup tasks required to get started with your Digital Customer Service application, refer to the related topics that follow.

There are many reasons why you might create a custom job role for Customer Self-Service users. One possible reason is when you create a custom object and want to assign privileges to that object.

To assign custom job roles for use in Digital Customer Service:

1. Create a custom role by making a copy of one of the following predefined roles:
   - Customer Self-Service User
   - Customer Self-Service Account Administrator

For more information about creating custom roles by making copies of roles, refer to the Copying Sales Roles: Points to Consider and Copying Job or Abstract Roles: Procedure links in the Related Topics.
2. Set the value of the appropriate Digital Customer Service profile option to the name of the custom role you created. The following profile options can be set to the name of the custom role:

- **SVC_CSS_USER_ROLE_COMMON_NAME**: If the value of this profile option is set to the name of a custom role, then all Customer Self-Service Users will be assigned this role when they are provisioned.
- **SVC_CSS_ACCT_ADMIN_ROLE_COMMON_NAME**: If the value of this profile option is set to the name of a custom role, then all self-service users who are assigned the Customer Self-Service Account Administrator role will receive this custom role.

For more information about setting profile options, refer to the Configuring Profile Options topic.

**Note**: If in the future, you want to change the profile option values while your Digital Customer Service application is already in use, you must perform a mass update of all existing users from the old roles to the new roles. Your Digital Customer Service application will not automatically update existing roles already granted to a user to the new roles.

**Related Topics**
- Copying Sales Roles: Points to Consider
- Copying Job or Abstract Roles: Procedure

### Performing a Role Synchronization

This topic describes how to configure a role synchronization.

**Note**: This topic is one of many required for the initial setup of Digital Customer Service. For more information about initial setup tasks required to get started with your Digital Customer Service application, see the related topics that follow.

Perform all of the tasks in this topic in the following order to configure role synchronization for your Digital Customer Service application:

1. Register the SIM Endpoint.
3. Submit User Identity Synchronization from this SaaS Instance to the PaaS Identity Store Job.
4. View User Identify and Role Synchronization Report.

### Registering the SIM Endpoint

You must begin by registering the SIM endpoint.

To register the SIM Endpoint:

1. Sign in to Oracle Engagement Cloud as an administrator or a setup user.
2. Navigate to the **Setup and Maintenance** work area.
3. Click the **Tasks** side tab menu (paper icon), and select **Manage Setup Content**.
   - The **Manage Setup Content** page appears.
4. In the **Topology Definition** section, click **Manage Third-Party Application**.
The Manage Third-Party Application screen appears.

5. Click Create (+ icon).
The Create Third-Party Application appears.

6. In the Application Name field, enter the following string:
   SIM_REST_ENDPOINTAPP

7. In the Full URL field, enter the URL for your SIM endpoint. The format of your SIM endpoint URL must adhere to the following conventions:
   https://idmrestinternal.<datacenter>.oraclecloud.com/cloudIdentity/<identity-domain>/.cloudPortal/api/v1

8. In the Partner Name field, enter the following string:
   SIM

9. Click Apply.

10. Click Save and Close.

Configuring Digital Customer Service User Roles for Synchronization with PaaS Identity Store

Once the SIM endpoint is registered, you can configure which Digital Customer Service roles must be synchronized between the SaaS Identity Store and the PaaS Identity Store.

When configuring role synchronization, you must specify the following roles:

- Customer Self-Service User
- Customer Self-Service Account Administrator

To configure role synchronization for Digital Customer Service:

1. Sign in to Oracle Engagement Cloud as an administrator or a setup user.
2. Navigate to the Setup and Maintenance work area.
3. From the Setup list, select Service.
   The Migrate Enterprise Roles and Assignments to PaaS Identity Store page appears.
6. Click Add Role (+ icon).
   The Add Additional Roles dialog box appears.
7. Enter the following string in the Display Name field:
   Customer Self-Service
   
   Note: Search strings as case sensitive.

8. Click Search.
9. From the Search Results list, select the following roles:
   - Customer Self-Service User
   - Customer Self-Service Account Administrator
10. Click **Add**. The roles are added to the **Migrate Enterprise Roles and Assignments to PaaS Identity Store** table.
11. Click **Done**.

For more information, refer to the Synchronizing Oracle Sales Cloud, Oracle HCM Cloud, and Oracle ERP Cloud User Identities and Roles to SIM solution in the Oracle Cloud Developers Solutions page, in the Related Topics that follow.

### Submitting User Identity Synchronization from this SaaS Instance to the PaaS Identity Store Job

To schedule a new process for role synchronization:

1. Sign in to Oracle Engagement Cloud as an administrator or a setup user.
2. Navigate to the **Setup and Maintenance** work area.
3. From the **Setup** list, select **Service**.
4. Click the **Digital Customer Service** functional area.
5. In the **Digital Customer Service Task** list, click **Submit User Identity Synchronization from this SaaS Instance to the PaaS Identity Store Job**.
   - The **Submit User Identity Synchronization from this SaaS Instance to the PaaS Identity Store Job** page appears.
6. (Optional) Enter any details in the **Submissions Notes** field.
7. Configure the synchronization schedule:
   - Click **Advanced**.
   - Click the **Schedule** tab.
   - For the **Run** option, click **Using a schedule**.
   - Select an option from the **Frequency** list, then select your frequency preferences. For Digital Customer Service, Oracle recommends that you schedule your automated role synchronization to occur every two to three minutes.
8. Click **Submit**.
   - A **Confirmation** dialog appears.
9. Click **OK**.

### Viewing User Identify and Role Synchronization Report

This task allows you to view the status of user identity and role synchronization jobs.

To view the status of user identity and role synchronization jobs:

1. Sign in to Oracle Engagement Cloud as an administrator or a setup user.
2. Navigate to the **Setup and Maintenance** work area.
3. From the **Setup** list, select **Service**.
4. Click the **Digital Customer Service** functional area.
5. In the **Digital Customer Service Task** list, click **View User Identity and Role Synchronization Report**.
   - The **Manage User Identity Synchronization to PaaS Identity Store** page appears.
6. Depending on the report you want to view, click one of the following tabs:
   - Users successfully Synchronized
   - Users failed to Synchronize
Users yet to Synchronize

7. You can configure an automated role synchronization. For Digital Customer Service, Oracle recommends that you schedule your automated role synchronization to occur every two to three minutes.

For more information, refer to the Synchronizing Oracle Sales Cloud, Oracle HCM Cloud, and Oracle ERP Cloud User Identities and Roles to SIM solution in the Oracle Cloud Developers Solutions page, in the Related Topics that follow.

Related Topics

• Synchronizing Oracle Sales Cloud, Oracle HCM Cloud, and Oracle ERP Cloud User Identities and Roles to SIM

Setting Up Administrators and Developers

This topic describes how to set up administrators and developers for Digital Customer Service in Oracle Engagement Cloud.

Notes: This topic is one of many required for the initial setup of Digital Customer Service. For more information about initial setup tasks required to get started with your Digital Customer Service application, see the related topics that follow.

Creating the APPID User for Digital Customer Service

An administrator-defined job role with the required privileges for Digital Customer Service must be created and then granted to a new APPID user. The APPID user is required when setting up the authentication for the Services API, the CRM Sales API and the Knowledge API during application configuration. The APPID is used by the APIs when a user has not signed in, or for Rest API calls during Sign Up.

This task ensures that the APPID user does not have more privileges than required. Follow both sets of steps in this topic to create the administrator-defined job role for the APPID, and then create the APPID user with the administrator-defined job role.

To create the administrator-defined job role for the APPID user:

1. Sign in to Oracle Engagement Cloud.
2. Navigate to the Security Console work area and click the Roles tab.
3. Click Create Role.
4. In the Role Name field, enter the following text:

   DCS APPID Users

5. In the Role Code field, enter the following text:

   DCS_APPID_USERS

6. From Role Category list, select Common - Job Roles.
7. (Optional) In the Description field, enter a description.
8. Click the Next button three times, until you reach the Role Hierarchy.
9. Click Add Role.
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The Add Role Membership dialog box appears.

a. In the Search field, enter each of the following roles, then click Add Role Membership:
   - Customer Self-Service Administrator
   - Opportunity Administration
   - Customer Self-Service Account Administrator
   - Customer Self-Service User
   - Service Request Channel User

Note: A Confirmation dialog appears each time your click Add Role Membership. Click OK after adding each role.

b. Click Close to close the Add Role Membership dialog box.

c. Click Close to close the Add Role Membership dialog box.

d. Click Add Role Membership.

e. Click OK.

f. Click Done.

6. Click Save and Close.

Creating a Developer or Administrator with Appropriate Roles

To work with business objects relevant to Digital Customer Service, the developer must be a Digital Customer Service user and must be granted the appropriate roles.

Note: You must set up role synchronization before setting up the Digital Customer Service developer user account. For more information about role synchronization, refer to Performing a Role Synchronization.

To create a Digital Customer Service developer or administrator, follow the instructions in these tasks:

1. Create a Test Customer Account
Note: This task is completed only once. The following two tasks must be completed for every Developer or Administrator.

2. Create a User Through REST API
3. Approve the User and Assign the Appropriate Roles

Creating a Test Customer Account

Before creating the Digital Customer Service developer or administrator user, a test customer account must be created and used when creating the new developer and administrator users. An account key is required when creating a new Digital Customer Service user.

Note: You only need to create the test customer account once. This test customer account can be used by all Developers and Administrators.

For more information about creating an account, see Setting Up Customer Accounts.

Creating a User Through REST API

This task will require the use of Postman or another REST API Tool.

To create a user through REST API, run the following command for each user who will be developing Digital Customer Service applications:

```
url: ../crmRestApi/resources/11.13.18.05/selfRegistrations
Authorization:
  Type: Basic Auth
  Username: DCS_SELF_REG_APPID (created in previous section)
Header:
  Accept - application/json
  Content-Type - application/vnd.oracle.adf.resourceitem+json
Action: Post
Payload:
  {"AccountKey" : "<test_customer_account>",
   "EmailAddress" : "<user_email@company.com>",
   "LoginId" : "<user_login>",
   "PersonFirstName" : "<user_firstname>",
   "PersonLastName" : "<user_lastname>",
  }
```

Where the `<test_customer_account>` is the test customer account that you created in the previous task. The same test customer account can be specified for all Administrators and Developers. The `<user_login>` is the ID that you want to use to sign in. The `<user_email@company.com>` is the email of the Digital Customer Service user that you are creating.

Note: The user will be created with a Status of Pending if the auto-approve feature is disabled.

Approve the User and Assign Appropriate Roles

Once the Administrator or Developer user is created, it remains in a Pending Status, until it is approved in Oracle Engagement Cloud. You must approve the user, then you must assign the Account Administration role.
Note: If it is the first user approved for this account, the user will automatically have the account administrator role. For all subsequent users, the Account Administrator role must be assigned.

For more information about approving the user, refer to Managing Registration Requests. For more information about assigning the Digital Customer Service Account Administrator role, refer to Managing Self-Service Users.

Once you have approved the user, and assigned the Digital Customer Service Account Administrator role, you must assign additional roles in the Security Console.

To assign

1. Sign in to Oracle Engagement Cloud.
2. Navigate to the Security Console work area and click the User tab.
3. Search for the user that created in the Creating a User Through REST API section.
4. From the search results, click the user.
5. Click Edit.
   The Edit User page appears.
6. Click Add Roles.
7. Add the following roles:
   - Sales Administrator
   - Employee
   Click Save and Close.

Note: Once the user is approved, an email is sent to the user with a link to reset the user account password. The user password must be reset.

Related Topics
- About Digital Customer Service Roles
- Administrator’s Guide for Oracle Visual Builder Cloud Service
- Managing Registration Requests
- Managing Self-Service Users

Setting Up Authentication for Your Application: Procedure

For your application to run properly, you must first set up system-to-system authentication between your Digital Customer Service application and Oracle Engagement Cloud.

To complete the tasks in this topic, you must be signed in to the Oracle Visual Builder Cloud Service with a valid developer or administrator account. This account was created in the previous topic. For more information about the developer user account that you created, refer to “Setting Up Administrators and Developers” earlier in this chapter.
To set up authentication, perform the following tasks:

2. Navigate to the Data Designer page.
3. Click the Services tab, select Knowledge, and then click the Authentication tab.
4. Configure the following fields under Service Authentication:
   a. From the Authentication Mechanism list, select Basic.
   b. Enter a user name for the APPID user that you created when setting up administrators and developers. For example DCSTest.Appid as the User Name. For more information, see "Setting Up Administrators and Developers" under Related Topics.
   c. Enter the Password for the APPID user.
   d. Specify the authentication for a logged on user:
      • For deployments with Digital Customer Service applications 17.4.1 and later connected to Oracle Engagement Cloud earlier than 17.11, do not select the Use different authentication for a logged in user check box.
      • For deployments with Digital Customer Service applications 17.4.1 and later connected to Oracle Engagement Cloud 17.11 or later, check the Use different authentication for a logged in user check box.
      • If you decided to use a different authentication for a logged in user, select the authentication that you want to use. From the Logged In Method list, select Oracle Cloud Account.
   e. Click Save to save the settings.
5. Set up authentication for Services API and CRM Sales API:
   a. Select CRM Sales API, and then click the Authentication tab.

   ✍️ Note: The steps outlined in the following steps must be completed for both Services API and CRM Sales API.
   b. Configure the following fields under Service Authentication:
      i. From the Authentication Mechanism list, select Basic.
      ii. Enter a user name for the APPID user that you created when setting up administrators and developers, for example DCSTest.Appid as the User Name. For more information, see "Setting Up Administrators and Developers" earlier in this chapter.
      iii. Enter the Password for the APPID user.
      iv. Select the Use different authentication for a logged in user check box.
      v. From the Logged In Method list, select Oracle Cloud Account.
      vi. Click Save.
      vii. Select Services API and repeat these steps.

Related Topics

• Overview of Digital Customer Service Components
Setting Up Customer Accounts

This topic describes how to set up end user customer accounts for Digital Customer Service. End user customers are required to have a known account key. This account key is required to enable the end user to self-register.

**Note:** This topic is one of many required for the initial setup of Digital Customer Service. For more information about initial setup tasks required to get started with your Digital Customer Service application, see the related topics that follow.

You must set up a customer account for testing your Digital Customer Service application. To set up a customer account, you are required to know the account key.

Configuring the Account Key

To set up customer accounts to use Digital Customer Service, you must create an account and associate it with an account key.

The account key is used to uniquely identify an account. The account key is determined by the value assigned to the SVC_CSS_ACCT_KEY_FIELD profile option. For more information about configuring profile options, refer to the Configuring Profile Options topic in the Related Links.

By default, the SVC_CSS_ACCT_KEY_FIELD profile option is mapped to the **Organization Name** field. You must create an attribute to be the account key, because the default account key is not secure.

Creating a Customer Account in Oracle Engagement Cloud

To set up a customer account:

1. Sign in to Oracle Engagement Cloud.
2. Navigate to the **Service** work area and click **Accounts**.
3. Click **Create Account**.
4. Enter the **Name**.
5. Specify the account key in the appropriate field.

**Note:** The field in which you enter the account key differs depending on your deployment. The account key should be specified in the attribute that you defined for the account key.

6. Click **Save and Close**.

About End User Self-Registration User Account Creation

The Oracle Digital Customer Service Reference Implementation has sample pages that provide the ability for an end user to self-identify and register within the application.

The end user needs the account key to register successfully.
Creating a New Digital Customer Service Application

This topic describes how to create a new Digital Customer Service application in Oracle Visual Builder Cloud Service.

 rãi: This topic is one of many required for the initial setup of Digital Customer Service. For more information about initial setup tasks required to get started with your Digital Customer Service application, see the related topics that follow.

To create a new Digital Customer Service application:

1. Sign in to the Oracle Visual Builder Cloud Service editor as a user with the Developer role.
2. Click New Application.
3. Click Web.
4. Specify the Application Name.
5. Specify the Application ID.
   The Application ID is automatically derived from the specified Application Name, but you can change it, if desired. The Application ID cannot be modified once the application is created: it appears in the application URL.
6. Click Next.
7. Click the template you want to use.


The following templates are provided for Digital Customer Service:

- Digital Customer Service Starter. This template is a blank application that includes no application pages other than a select few pages for error handling. This template makes the Digital Customer Service components available in the component palette.
- Digital Customer Service Reference Implementation. This template creates an application with basic service functionality, including the ability to create and update SRs, search knowledge, browse products, and chat with an agent.

8. Click Next.
9. (Optional) Remove any predefined pages, or add new pages.
10. Click Finish.
   The Digital Customer Service application has been created. You are now ready to configure your Digital Customer Service application to meet your business needs.

hani: When Oracle Engagement Cloud is deployed with multiple business units, additional configuration is required. For more information, refer to the Configuring Multiple Business Units with Digital Customer Service topic in the Related Topics.

Related Topics
• About Digital Customer Service Terminology
Setting Up Roles

This topic describes how to set up roles for Digital Customer Service.

 çe Note: This topic is one of many required for the initial setup of Digital Customer Service. For more information about initial set up tasks required to get started with your Digital Customer Service application, see the related topics that follow.

To set up roles for Digital Customer Service:

1. Sign in to the Oracle Visual Builder Cloud Service editor as a user with the Developer role.
2. Click your Digital Customer Service application.
3. Click the Main menu icon and select Application Settings.
5. Map the Account Administrator role to the Customer Self-Service Account Administrator role:
   a. In the Roles section, click menu next to Account Administrator, then select Edit. The Edit Role dialog box appears.
   b. In the Maps to list, select Customer Self-Service Account Administrator.
   c. Click Save and Close.
6. Map the User role to the Customer Self-Service User role:
   a. In the Roles section, click menu next to User, then select Edit. The Edit Role dialog box appears.
   b. In the Maps to list, select Customer Self-Service User.
   c. Click Save and Close.

Setting Up Products, Categories and Knowledge Articles for Digital Customer Service

This topic describes how to create products and categories, and author knowledge articles, specific to Digital Customer Service. Product items and groups are used within the Digital Customer Service application to provide better support and knowledge article navigation. Additionally, product items and groups facilitate associating service requests for process flows within Oracle Engagement Cloud. Consider your creation and use of product items and groups as a mechanism to improve the customer experience.

 çe Note: This topic is one of many required for the initial setup of Digital Customer Service. For more information about initial setup tasks required to get started with your Digital Customer Service application, see the Related Topics.
To configure products and categories for service request management:

1. Sign in to Oracle Engagement Cloud as an administrator or a setup user.
2. Configure the products that are available in service requests.

Note: When creating your products, the following options must be selected: Eligible to Sell, Eligible for Service and Enable Customer Self-Service.

For information about configuring products, refer to the Related Topics.

3. Configure the available categories for service requests.
For information about configuring categories, refer to the Related Topics.

4. Author Knowledge articles that you want users to have access to in their Digital Customer Service applications.
For information about creating and editing knowledge articles, refer to the Related Topics.

Related Topics
- Managing Service Request Categories: Explained
- Working with Sales Products: Procedures
- Knowledge Articles: Explained

Importing Self-Service User Roles

This topic describes how to import self-service users for use with your Digital Customer Service application.

Prior to performing the tasks in this topic, accounts and contacts must be created or imported in Oracle Engagement Cloud. For more information about performing these prerequisite tasks, refer to the Related Topics.

Downloading the Self-Service Roles Template

This section describes how to download the self-service roles template.

To download the self-service roles template file:

1. Sign in to Oracle Engagement Cloud as an administrator or a setup user.
2. Navigate to the Setup and Maintenance work area.
3. Click the Tasks icon, then click Search.
4. In the Search text box, enter the following task name: Define File Import
5. Click the Search button.
6. Click the Define File Import task.
7. Click the Manage File Import Objects task.
8. Enter the following string in the text box at the header of the Code column:
   "ORA_SVC_CSS_ROLES"
9. Click the Enter key.
10. Click the ORA_SVC_CSS_ROLES row in the Manage File Import Objects list.
11. Click **Download Template**.
12. Click **Save File**, then **OK**.
13. Specify a download location for the template file, then select **Save**.
14. When the download completes, click **Done**.

The ORA_SVC_CSS_ROLES_Template.zip is downloaded.

Preparing the Import File

This section describes how to prepare the import file for importing self-service users. For more information about file-based data import, refer to Understanding File-Based Data Import and Export in the Related Topics.

To prepare the import file:

1. Locate, and open the ORA_SVC_CSS_ROLES_Template.zip file that you saved in the Downloading the Self-Service Roles Template topic.
2. Extract the SVC_SELF_SERVICE_ROLES.csv file.
3. Open the SVC_SELF_SERVICE_ROLES.csv file.

   **Note:** The SVC_SELF_SERVICE_ROLES.csv file contains many fields that are not required. You can remove any of the unused fields from the first row of the file.
4. For each self-service user you plan to import, enter the following data in a dedicated row:
   a. Enter the account information relating to the self-service user in the **AccountPartyId** or **AccountPartyNum** column.
   b. Enter the contact information relating to the self-service user in the **ContactPartyId** or **ContactPartyNum** column.
   c. (Optional) Enter the login ID relating to the self-service user in the **LoginId** column.
   d. Enter the roles to assign to the self-service user in the **RelationshipTypeCd** column. The following values can be assigned:
      - **ORA_CSS_USER**
      - **ORA_CSS_ACC_MGR**
      - **ORA_CSS_ACC_ADMIN**

   **Note:** Multiple roles can be assigned to a user and must be concatenated with the following character: &. For example: **ORA_CSS_USER&ORA_CSS_ACC_ADMIN**
5. Repeat step 4, on a dedicated row for each additional self-service user you want to import.

   **Note:** For each **AccountPartyId** or **AccountPartyNum**, at least one user in the import file must have the **ORA_CSS_ACC_ADMIN** role assigned.
7. Include the SVC_SELF_SERVICE_ROLES.csv in a new SVC_SELF_SERVICE_ROLES.zip archive, and save it.

Importing the Self-Service Users

Before proceeding with the instructions in this section, you must have completed the steps in the previous sections:

- Downloading the Self-Service Roles Template
• Preparing the Import File

Note: Before beginning your import, Oracle Recommends that you ensure that the `ZBS_TI_RETRY_ATTEMPTS` profile option is set to 1.

To import the self-service users:

1. Sign in to Oracle Engagement Cloud as an administrator or a setup user.
2. Navigate to the Setup and Maintenance work area.
3. Click Tasks icon, then click Search.
4. In the Search text box, enter the following task name: Manage File Import
5. Click the Search button.
6. Click the Manage File Import Activities task.
7. Click the + button (Create).
   
   The Create Import Activity: Enter Import Options screen is displayed.
8. Enter a name in the Name field.
9. From the Object list, select Self-service roles.
10. In the Source File section, select the Desktop option for Upload From.
11. Click Browse, to locate and specify the SVC_SELF_SERVICE_ROLES.zip file that you created in step 7 of the Create the Import File section.
12. Click Next.

   The Create Import Activity: Map Field screen is displayed.
13. Verify the mappings are as expected. If necessary, make your corrections.
14. Click Next.

   The Create Import Activity: Create Schedule screen is displayed.
15. From the Schedule list, select Immediate.
16. Click Next.

   Your import job is listed in the Manage Import Activities list. The Status value of your job will change multiple times during processing, until it is Completed or Completed with Errors.

Note: If the Status value is Completed with Errors, some users might not have been imported. Click the Completed with Errors link to view the error details. For more information about importing users, refer to Importing Users Overview in the Related Topics.

Sending Pending LDAP Requests

Perform this task after successfully importing the self-service user roles.

To send the pending LDAP requests:

1. Sign in to Oracle Engagement Cloud as an administrator or a setup user.
2. Navigate to the Scheduled Processes work area.
3. Click Schedule New Process.

   The Schedule New Process dialog box appears.
4. Select the **Job** option.
5. Click the **Name** menu, then select **Search**.
6. Enter the following string in the **Name** text box, then click **Search**:
   
   Send Pending LDAP Requests

7. Click **Send Pending LDAP Requests**, then click **OK**.
8. Click **OK** on the **Schedule New Process** dialog box.

   The **Process Details** dialog box appears.

9. Click **Submit**.

   A **Confirmation** dialog is displayed.

10. Click **OK**.

   Monitor the job. When it’s complete, the newly imported self-service users are created in LDAP.

**Related Topics**

- Understanding File-Based Data Import and Export
4 Configuring Additional Features within Digital Customer Service

Configuring Multiple Business Units with Digital Customer Service

This topic describes how to configure your Digital Customer Service application if you have multiple business units in Oracle Engagement Cloud.

When you have multiple business units, additional configuration is required once you have created your Digital Customer Service applications. Each business unit must have its own Digital Customer Service application.

⚠️ Note: Only one business unit is supported per Digital Customer Service application.

For more information about setting up multiple business units, refer to the following cross-references in the Related Topics section: Setting Up Business Units for Service and Multiple Business Units in Sales Cloud.

Once you have created your Digital Customer Service applications, follow the instructions in the following sections of this topic:

1. Locate the business unit ID in Oracle Engagement Cloud.
2. Specify the business unit ID in the Digital Customer Service application.
3. Configure the Business Unit ID for the Open Service Requests list.

Locating the Business Unit ID

To locate the business unit ID for your Digital Customer Service application:

1. Sign in to Oracle Engagement Cloud as an administrator or a setup user.
2. Navigate to the Setup and Maintenance work area.
3. From the Setup list, select Service.
4. Click the Manage Business Units link.
5. Locate your business unit in the Search Results list and copy the value in the BusinessUnitId column.

⚠️ Note: If you do not see a BusinessUnitId column, click the View menu to access the Columns menu, and then select the columns to display.

Specifying the Business Unit ID in the Digital Customer Service Application

Once you have located the business unit ID in Oracle Engagement cloud, you must specify the business unit ID in your Digital Customer Service application config.json file.

To specify the business unit ID in the config.json file:

1. Navigate to the Oracle Visual Builder Cloud Service editor.
2. Click the Main Menu icon in the editor, and select Application Settings, then Resource Browser.
3. In the Resource Browser, navigate to the user/resources folder, then click config.json.
4. Locate the businessUnitID parameter.
5. Assign the value that you copied in Locating the Business Unit ID task to the businessUnitID parameter. For example:

   "businessUnitID": "<BUID>".

   Where <BUID> is the business unit ID.
6. Click **Save Changes**.

### Configuring the Business Unit ID for the Open Service Requests List

Once you have specified the business unit ID for the application, you must configure the **Open Service Requests** list in your Digital Customer Service application to point to your business unit.

To configure the **Open Service Requests** list to only show service requests from your configured business unit:

1. Navigate to the Oracle Visual Builder Cloud Service.
2. Open your Digital Customer Service application.
3. On the **Home** screen, click the **Open Service Requests** list.
4. In the Property Inspector **List** panel, click the **Data** icon tab.
5. In the **Default Query** section, click the **Edit** icon.

   The **Edit Default Query** dialog box is displayed.
6. Click Add.

   A new row appears in the table.
7. In the new row, specify the following values for the fields:

   - **Select field.** Select **Business Unit ID** from the menu.
   - **Operand.** Select **Equals** from the menu.
   - From the drop-down list with the **A** icon, select **Expression**.

   The **Set Expression** dialog appears. Specify the following value in the text box:

   ```
   $$dcsCommon.Config.businessUnitID
   ```

8. Click **OK**.
9. Click **Save**.

**Related Topics**

- Creating a New Digital Customer Service Application
- Multiple Business Units in Sales Cloud: Overview
- Setting Up Business Units for Service: Overview
Configuring Cobrowse

This topic describes how to configure Oracle Cobrowse for Digital Customer Service.

Setting Up Cobrowse

Setting up Oracle Cobrowse is a task that occurs in Oracle Service Cloud. This topic describes what is required from Oracle Service Cloud, before integrating the Oracle Cobrowse script tag in your Digital Customer Service application.

To set up Oracle Cobrowse:

1. Configure the Oracle Cobrowse widget using the Oracle Cobrowse administration UI. For more information, refer to topics about configuring the Cobrowse user interface in the Implementing Standalone Cobrowse guide.
2. Locate the script tag from the Oracle Cobrowse administration UI. For more information, refer to topics about configuring your company deployment in the Implementing Standalone Cobrowse guide.

Integrating the Cobrowse Script Tag in Your Digital Customer Service Application

Before integrating Oracle Cobrowse with your Digital Customer Service application you must configure Cobrowse in Oracle Service Cloud and obtain the script tag.

To integrate the Oracle Cobrowse script tag in your Digital Customer Service application:

2. Click the Main Menu.
3. Click Application Settings, and select Extensions.
4. Click the Theme tab.
5. Click the name of the theme that your application is using. Information about your selected theme is displayed.
6. Click the Sources tab.
7. In the Resource Browser, navigate to the user/extensions/<theme_id>/theme folder.
8. Click the layout.html file. The contents of the file are displayed following the Resource Browser.
9. Paste the Cobrowse <script> tag immediately before the last </div> tag in the layout.html file.
10. Click Save Changes.
11. Verify that Oracle Cobrowse is available, by refreshing your browser. The Cobrowse launch point is displayed because it has been configured.

⚠️ Note: If the Cobrowse script tag is removed from the Digital Customer Service theme, a full browser reload must be performed to ensure that the changes are properly reflected in the application.

Related Topics

- Implementing Standalone Cobrowse
- Creating a New Digital Customer Service Application
Associating Content Types with Images

This topic describes how to add and associate an image with a content type. When you configure your Digital Customer Service application, you might want to associate modified image icons with your content types. By default, the following images are packaged with your Digital Customer Service application:

- FAQ.png
- SOLUTION.png
- KNOWLEDGE.png

The FAQ.png and SOLUTION.png files correspond to content types in Knowledge. The KNOWLEDGE.png file is the default image that is displayed when list sample data is displayed in a list. You cannot add new content types. The content-type file that is uploaded in this topic must be uploaded in a compressed .zip type file. For example, if you want to upload the FAQ.png, you would have to upload it within a FAQ.zip file.

Note: The optimal size for content type images is 32 x 32 pixels.

To associate an image with a content type:

2. Click the Main Menu icon in the editor, and select Application Settings, then Resource Browser.
3. In the Resource Browser, navigate to the user/resources/images folder, then contextually-click the content-type folder, then select Import.
   - The Import file dialog box appears.
4. Add an image, then click Done.

Note: The file must already exist in the folder. The image must be a PNG, and the file name must be the same name as the capitalized Content Type name. For example, if the Content Type is “FAQ” the file name must be FAQ.png.

Mapping Roles

This topic describes how to manage role mappings for Digital Customer Service.

To allow the Oracle Visual Builder Cloud Service role to match with the Oracle Engagement Cloud role you must map roles. Completing this task will help you manage user roles in the Oracle Engagement Cloud and your Digital Customer Service application similarly.

You must follow the process for mapping roles in this topic if you want to define additional roles.

Mapping a New Role

To map a new role for Digital Customer Service:

2. Click your application.
3. Click the Main menu icon and select Application Settings.
5. In the Roles section, click New Role.
6. Enter the Application Role Name.
7. In Maps to select the Oracle Engagement Cloud role to which to map.
8. (Optional) Enter a description in the Description field.
9. Click Create to complete the mapping.

Editing an Existing Role Mapping

To edit an existing role mapping for Digital Customer Service:

2. Click your application.
3. Click the Main menu icon and select Application Settings.
5. In the Roles section, click the Role mapping menu options menu on the mapping that you want to edit.
6. Click Edit.
   The Edit Role dialog box appears.
7. Modify the Application Role Name.
8. Modify the role in the Maps to menu.
9. Modify the description in the Description field.
10. Click Save and Close.

Removing an Existing Role Mapping

To remove an existing role mapping for Digital Customer Service:

2. Click your application.
3. Click the Main menu icon and select Application Settings.
5. In the Roles section, click the Role mapping options icon next to the mapping you want to remove.
6. Click Remove.

Creating a Digital Customer Service Icon in Oracle Engagement Cloud

When performing certain actions in the Digital Customer Service application, users are redirected to the Oracle Engagement Cloud Dashboard. To facilitate an easier path for your users, Oracle recommends that you provide a Digital Customer Service icon within the dashboard. This topic describes how to create a Digital Customer Service icon in Oracle Engagement Cloud.

Note: If you use a third-party identity management solution with Oracle Engagement Cloud, you must address the redirect issues within your deployment.
Follow the procedures in this topic in the stated order to create a Digital Customer Service icon in Oracle Engagement Cloud:

1. Create a New Sandbox
2. Create a New Card Icon for Accessing Digital Customer Service
3. Validate the Card Icon
4. Publish the Sandbox

Creating a New Sandbox

To create a new sandbox:

1. Sign in to Oracle Engagement Cloud.
2. Click the User menu and select Manage Sandboxes.
3. Click the + icon (New) to create the new sandbox.
4. Select the sandbox created in Step 3.
5. Click Set as Active.

Creating a New Card Icon for Accessing Digital Customer Service

To create a new card icon for accessing Digital Customer Service:

1. Sign in to Oracle Engagement Cloud.

   ✍️ Note: Ensure that your sandbox is set as active.

2. Navigate to the Tools work area and click Structure.
3. From the Create menu, select Create Page Entry.
4. Enter information for the new card:
   - **Name**: Specify DCS.
   - **Icon**: Select an icon.
   - **Category**: Select Service.
   - **Navigator**: Select EL Expression, then select the Edit and paste the following expression:
     
     ```
     #{!securityContext.userInRole['ORA_PER_EMPLOYEE_ABSTRACT']}
     ```
   - **Springboard**: Select EL Expression, then select the Edit and paste the following expression:
     
     ```
     #{!securityContext.userInRole['ORA_PER_EMPLOYEE_ABSTRACT']}
     ```
   - **Link Type**: Select Static URL.
   - **Destination**: Specify the URL for your Digital Customer Service web application.
5. Click Save and Close.

Validating the Card Icon

To validate the card icon:

1. Sign in to Oracle Engagement Cloud.
2. Click the User menu and select Manage Sandboxes.
3. Select the sandbox created in the Create a New Sandbox topic.
4. Click Set as Active.
5. Navigate to the **Home** page.

The **DCS** icon appears on the **Home** page and in the **Navigator**.

### Publishing the Sandbox

To publish the sandbox:

1. Sign in to Oracle Engagement Cloud as a user with the Sales Administrator job role.
2. Click the **User** menu and select **Manage Sandboxes**.
3. Select the name of the sandbox created in the Create a New Sandbox topic.

   The Sandbox Details dialog appears.
4. Click **Publish**.

**Related Topics**
- Using Sandboxes: Explained

### About Application Configuration Settings

This topic describes Digital Customer Service application configuration settings.

Digital Customer Service application settings are configured in the **config.json** file within your Digital Customer Service application in Oracle Visual Builder Cloud service. This topic describes how to configure settings, followed by descriptions of the parameters.

### Modifying the Configuration Settings

This topic describes how to modify configuration settings for your Digital Customer Service application in the Oracle Visual Cloud Builder Service. The parameters that are available for configuration are described in the topics that follow.

To modify parameters in the **config.json** file:

1. Navigate to the Oracle Visual Builder Cloud Service editor.
2. Click the **Main Menu** icon in the editor, and select **Application Settings**, then **Resource Browser**.
3. In the **Resource Browser**, navigate to the **user/resources** folder, then click **config.json**.
4. Configure your parameters.
5. Click **Save Changes**.

### About Linking

This topic describes the **config.json** parameters related to Service Request and Knowledge Management article linking.

All of the parameters related to Service Request and Knowledge Management article linking are contained in the **linkedTypes** section of the **config.json** file. When you use the Digital Customer Service Reference Implementation template or the Digital Customer Service Starter template, the linkedTypes section is configured as follows:

```json
"linkedTypes": {
   "ARTICLE_LINK": { "page": "com_oracle_css_knowledgeBOP_AnswerPage" },
   "SERVICE_REQUEST_CRM": { "page": "sr_serviceRequests_serviceRequestsPage" },
   "SERVICE_REQUEST_HCM": { "page": "sr_serviceRequests_serviceRequestsPage" }
}
```
The **SERVICE_REQUEST** and **KNOWLEDGE_LINK** object type lines control the Service Request and Knowledge Management article linking respectively.

By default in the Digital Customer Service Reference Implementation and the Digital Customer Service Starter templates, **SR** is defined as the case-insensitive prefix that identifies Service Requests. For Knowledge Management articles, **SOL** and **FAQ** can be used interchangeably as the case-insensitive prefix that identifies articles. These prefixes are defined in the **pattern** parameter in each object type.

For example, if you want to change the prefix for Service Requests specifically to include both **SR** and **Service Request** as the prefix patterns, modify the **SERVICE_REQUEST** object type as follows:

```
"SERVICE_REQUEST": { "page": "sr_serviceRequests_serviceRequestsPage", "pattern": "\b(SR|Service Request)\d{10}\b" },
```

By default in the Digital Customer Service Reference Implementation and the Digital Customer Service Starter templates, **sr_serviceRequests_serviceRequestsPage** is defined as the **PageID** for Service Requests, and **com_oracle_css_knowledgeBOP_AnswerPage** is defined as the **PageID** for Knowledge Management articles. These pages are defined in the **page** parameter in each object type.

For example, if you create a new page in your Digital Customer Service application, and you want to associate this newly created page with a **PageID** of **com_oracle_css_MyNewknowledgePage_AnswerPage** with Knowledge Management articles, modify the **KNOWLEDGE_LINK** object type as follows:

```
"KNOWLEDGE_LINK": { "page": "com_oracle_css_MyNewknowledgePage_AnswerPage", "pattern": "\b((?:SOL|FAQ)\d+)\b", "keyProperty": "IMDocumentId" }
```

### Configuring Product and Category Filtering

This topic describes the **config.json** parameters related to configuring flags.

- **onlyCSSCategories** Specifies the categories to display in your Digital Customer Service application. When set to **true**, categories with the **CSSFlag** set to **false** in the REST API will not be displayed in the **Category Selector**.
- **onlyCSSProducts** Specifies the products to display in your Digital Customer Service application. When set to **true**, only products with **Enable for Customer Self Service** set to **YES** will be displayed in the **Product Picker** and **Product Selector**. When set to **false**, all products in the Oracle Engagement Cloud Service product catalog are displayed.

### Configuring Language Defaults in Knowledge Management

This topic describes the **config.json** parameters related to language defaults in Knowledge Management.

This configuration is required when more than one region is supported for the same language, because the default from the configuration file is used. Also for the API that retrieves the Knowledge Management locales, a **localeId** must be provided in the **kmauthtoken**, so that value is taken from the configuration file.

Oracle Knowledge Management supports a predetermined set of locales for knowledge searches. If the **Accept-Language** header element of the knowledge search REST request does not match one of the supported locales, an HTTP 400 error is returned. To prevent this, the locale specified in the **Accept-Language** header is overridden. This logic that determines the override locale is as follows:

1. Query the Server for all the supported locales and cache it.
2. Get the locale preference from the Oracle JET locale configuration using oj.Config.getLocale();
Note: Oracle JET determines the locale for locale-sensitive operations in the following order: locale specification in the RequireJS configuration, lang attribute of the HTML tag, navigator.language browser property or navigator.userLanguage Internet Explorer property.

- If the locale preference is on the supported locale list, use it.
- If the locale preference is not a supported locale, extract the language from it.

3. Search the supported locale list by language. If only one match is found, use it.
4. Search kmLanguageDefaults in config.json by language. If a match is found, use it.
5. Pick the default locale for any language not on the list and use it.

The kmLanguageDefaults entry in config.json maintains a mapping of language to locale. If an asterisk (*) is specified for language, then it will match any language not specified and map it to a locale.

For example:

```
```

Using this example, if the Oracle JET locale is set to zh_HK and is not on the locales supported by Knowledge Management, then the locale override will be set to zh_CN.

About the Interface ID for Knowledge Requests

This topic describes the config.json parameters related to Interface ID defaults for Knowledge Management articles.

Use the kmInterfaceId parameter to control what type of Knowledge Management articles appear in your Digital Customer Service application.

<table>
<thead>
<tr>
<th>kmInterfaceId Parameter Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Only Oracle Engagement Cloud articles appear.</td>
</tr>
<tr>
<td>2</td>
<td>Only Oracle HMC Cloud articles appear.</td>
</tr>
<tr>
<td>-1</td>
<td>Both Oracle Engagement Cloud and Oracle HMC Cloud articles appear.</td>
</tr>
</tbody>
</table>

Post-Configuration Verification Tasks

This topic describes the post-configuration verification tasks recommended after configuring your Digital Customer Service application. The tasks outlined in this topic, apply only in the following cases:

- You created your own Digital Customer Service application using the Starter template and used the components listed herein.
Verifying the Knowledge Search Component

To verify the Knowledge Search component:

1. Sign in to your Digital Customer Service application as an anonymous user.
2. Enter the search text for the Knowledge Management articles that have been created.
3. Click the **Search** icon.
4. Verify that the search results match the search text.
5. Click the **Category** field to verify the list of categories are displayed.
6. Click the **Product** field to verify the list of products are displayed.
7. Sign out.
8. Sign in to your Digital Customer Service application as a self-registered user.
9. Enter the search text for the Knowledge Management articles that have been created.
10. Click the **Search** icon.
11. Verify that the search results match the search text.
12. Click the **Category** field to verify the list of categories are displayed.
13. Click the **Product** field to verify the list of products are displayed.

Verifying the Product Picker Component

To verify the Product Picker component is properly configured:

1. Sign in to your Digital Customer Service application as a self-registered user.
2. Verify that the Product Picker contains products, as configured in the Oracle Visual Builder Cloud Service designer.
3. Verify that the Product Picker displays the image of the product that has been uploaded.
4. Click a product in the Product Picker to ensure that you are redirected to the expected **Product Details** page.

Verifying the Service Request Creator Component

To verify the Service Request Creator component:

1. Sign in to your Digital Customer Service application as a self-registered user.
2. Click a product in the Product Picker.
3. Click **Create Service Request**.
4. Verify that the Product field contains the product that you selected in Step 2.
5. Enter details in the following fields:
   - **Title**
   - **Problem Description**
   - **Category**
6. Click **Submit**.
7. Verify that a green confirmation message appears.
8. Navigate to the **Home** page.
9. Click **Create Service Request**.
10. Enter details in the following fields:
   - **Title**
   - **Problem Description**
Verifying the Service Request List Component

To verify the Service Request List component:

1. Sign in to your Digital Customer Service application as a self-registered user.
2. Verify that the Service Requests list contains the service requests created in the Verify the Service Request Creator Component task.
3. Specify a Filter.
4. Verify that the Service Request list returns only SRs that contain the filter in the title.
5. Change the Sort By to Reference Number Ascending.
6. Verify that the Service Request list is ordered by SR number, where the lowest SR number appears first in the list.

Verifying the Edit Service Request Data Component

To verify the Edit Service Request Data component:

1. Sign in to your Digital Customer Service application as a self-registered user.
2. View an existing SR by selecting it from the Service Requests list.
3. Verify that the details of the SR that you selected are displayed as expected.
4. Add a message:
   a. Enter a message in the Comment field.
   b. Click Submit.
   c. Verify that the message you entered is displayed in the list of messages at the end of the page.
5. Add a file attachment:
   a. Click the File Attachments tab.
   b. Click Add.
   c. Choose a file and enter a description.
   d. Click Upload.
   e. Verify that the file and its description are listed in the list of file attachments.
   f. Click the file name.
   g. Verify that the file is successfully downloaded.
6. Add a URL attachment:
   a. Click the URL Attachments tab.
   b. Click Add.
   c. Enter a URL and a description.
   d. Click Upload.
   e. Verify that the URL and its description are listed in the list of URL attachments.
7. Escalate the SR:
   a. Click Escalate.
   b. Enter a comment for the escalation.
c. Click Save and Escalate.
d. Verify that the SR displays an escalated indicator.
e. Verify that the escalation comment appears in the list of messages on the Messages tab.

8. Close the SR:

a. Click Close
b. Enter a comment for the SR closure.
c. Click Save and Close
d. Check that the SR displays a closed status.
e. Verify that the closure comment appears in the list of messages on the Messages tab.

Verifying the Chat Component

To verify the Chat component:

1. Sign in to your Digital Customer Service application as a self-registered user.
2. Click the Chat link.
3. Fill in the Subject field.

*Note:* Some user details are prepopulated in form

4. Click Start Chat.
5. Verify that the chat connects, and is placed in the queue.
5 Managing Digital Customer Service Components

Overview of Digital Customer Service Components

This topic describes the Digital Customer Service components that are available when configuring your application in the Oracle Visual Builder Cloud Service.

Product Components

The following table describes components specific to products. It also lists the restrictions associated with the component and any additional configuration required.

<table>
<thead>
<tr>
<th>Component Name</th>
<th>Description</th>
<th>Restrictions</th>
<th>Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Picker</td>
<td>Enables the account user to navigate to a product page where they can view knowledge specific to the product and file service requests. This component displays a selection of products with associated images.</td>
<td>None</td>
<td>For more information, refer to the Configuring the Product Picker topic.</td>
</tr>
<tr>
<td>Category Selector</td>
<td>Enables users to select a category by which to filter the search results. This component works in conjunction with Knowledge Search, Chat, Create Service Request and Edit Service Request.</td>
<td>None</td>
<td>The following properties can be configured:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Label</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Label Position</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Placeholder</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• No Data Message</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Tree Table Header</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Filter Results Table Header</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Display Mode</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• <strong>Type to Invoke Search label</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Minimum Three Character Label</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Click to Show Tree Label</td>
</tr>
<tr>
<td>Product Selector</td>
<td>Enables users to select a product by which to filter the search results. This component works in conjunction with Knowledge Search, Chat, Create Service Request and Edit Service Request.</td>
<td>None</td>
<td>The following properties can be configured:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Label</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Label Position</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Placeholder</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• No Data Message</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Tree Table Header</td>
</tr>
</tbody>
</table>


### Chapter 5
Managing Digital Customer Service Components

#### Contact Methods Components

The following table describes components specific to contact methods. It also lists the restrictions associated with the component and any additional configuration required.

<table>
<thead>
<tr>
<th>Component Name</th>
<th>Description</th>
<th>Restrictions</th>
<th>Configuration</th>
</tr>
</thead>
</table>
| Contact Us     | Displays a series of links that enables users to communicate with the business:  
- **Create Service Request.** Creates a service request.  
- **Chat.** Displays a status message, estimated time and the disabled state.  
- **Contact Us.** When clicked, a new page displays a paragraph that the designer can configure to include phone numbers, email, and other information. | None | The following properties can be configured for the Create Service Request and Contact Us options:  
- Label  
- Label Position  
- Link Text  
- Link Target  
- Disabled  
For more information about the properties that can be used for the Chat option, refer to the Chat Component row in this table. |
| Chat           | Enables users to initiate a chat request and exchange messages with an agent. | None | The following properties can be configured:  
- Category  
- Link Label  
- Product  
- Product Label  
- Start Chat Label  
- Selectable  
- Send Message Label  
- Service Request  
- Service Request Label  
- Window Height (number + Relative Absolute) |
Knowledge Management Components

The following table describes components specific to knowledge management. It also lists the restrictions associated with the component and any additional configuration required.

Note: For the Knowledge Management components to run properly, you must first set up authentication for the Knowledge service. For more information, see the "Setting up Authentication for Knowledge Service: Procedure" topic.

<table>
<thead>
<tr>
<th>Component Name</th>
<th>Description</th>
<th>Restrictions</th>
<th>Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge Search Box</td>
<td>Defines a simple text entry search field which collaborates with a search results component to display a list of knowledge articles associated with the entered text. This component consists of a text entry field, a search button, a Knowledge Product Selector and a Knowledge Category Selector.</td>
<td>When submitting a query, search terms are required. When dropping the search box component, at least one page must contain a Knowledge Article List or Knowledge Search Result List to display the results when the query is submitted.</td>
<td>When dropping this component, a dialog box appears asking users to select the page where they want to display the answers to the search query. Users must select a page with a Knowledge Article List or Knowledge Search Result List. If the component is being dropped on a page that has a Knowledge Article List or Knowledge Search Result List, then the dialog box does not appear, because the results are being shown on that page.</td>
</tr>
<tr>
<td>Knowledge Search Result List</td>
<td>Enables users to enter search terms and view the resulting list of knowledge articles. Users can optionally filter the results by product or category. This component consists of a search box, a category selector, a product selector and a knowledge article list.</td>
<td>None</td>
<td>If you want the knowledge article titles to be in bold, use the following styling in the src/ri/public_html/repository/user/resources/applicationCSS file: /* Make the knowledge result list titles bold in the Knowledge Search page*/ div[data-view-id=&quot;list-71849101&quot;] a. oj-label-inline { font-weight: bold !important;</td>
</tr>
</tbody>
</table>
### Knowledge Article Icon

**Display:** Displays an image next to a knowledge article in a search result list. Different images can be associated with different knowledge content types.

**Restrictions:** The Knowledge Article Icon component can only be dropped inside a Knowledge Article List component or a Knowledge Search Result List component.

**Configuration:** None

**Note:** When using the Default Query on the Knowledge Article List, the category and product filters use the category identifier and product identifier respectively, and not the category name or product name.

For example, if you drop the Knowledge Article List component on the Product page, in the **Edit Default Query** dialog box, select the **Expression** function type for the field.

In **Available Fields**, under the **Local** tab, select **Item Description**.

Click **OK** and then click the check mark to save the query.

If you want the knowledge article titles to be in bold, use the following styling in the **src/ri/public_html/repository/user/resources/application.css** file:

```css
/* Make the knowledge result list titles bold in the Knowledge Search page*/

div[data-view-id="list-71849101"] a.oj-label-inline
{ font-weight: bold !important; }
```

### Knowledge Article Detail

**Display:** Displays the details of a single knowledge article.

**Restrictions:** The Knowledge Article Detail component can only be dropped on the Answer page.

**Configuration:** None

The Answer page is automatically created when you drop the Knowledge Search Result List component or
### User Administration Components

The following table describes components specific to user administration. It also lists the restrictions associated with the component and any additional configuration required.

<table>
<thead>
<tr>
<th>Component Name</th>
<th>Description</th>
<th>Restrictions</th>
<th>Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration Requests</td>
<td>Enables the Customer Self-Service Administrator to:</td>
<td>When added to an application, only users with the Customer Self-Service Account Administrator role can see this component in the application.</td>
<td>See “Configuring Registration Requests Component” in the Setting Up User Administration Components: Procedure topic. Create a Landing type page to use with this component.</td>
</tr>
<tr>
<td>Self-Service Users</td>
<td>Enables the Customer Self-Service Account Administrator to:</td>
<td>When added to an application, only users with the Customer Self-Service Account Administrator role can see this component in the application.</td>
<td>See “Configuring Self-Service Users Component” in the Setting Up User Administration Components: Procedure topic. Create a Landing type page to use with this component.</td>
</tr>
<tr>
<td>My Profile</td>
<td>Enables an authenticated user to view details about her profile including her roles.</td>
<td>None</td>
<td>See “Configuring My Profile Component” in the Setting Up User Administration Components: Procedure topic.</td>
</tr>
<tr>
<td>Sign In</td>
<td>Enables users who have already registered and been approved to sign in.</td>
<td>None</td>
<td>No specific configuration required.</td>
</tr>
<tr>
<td>Sign Up</td>
<td>Enables non-authenticated users to sign up using self-registration.</td>
<td>None</td>
<td>See “Configuring Sign Up Component” in the Setting Up User Administration Components: Procedure topic. Create a Create type page to use with this component.</td>
</tr>
</tbody>
</table>
Service Requests Components

The following table describes components specific to Service Requests. It also lists the restrictions associated with the component and any additional configuration required.

<table>
<thead>
<tr>
<th>Component Name</th>
<th>Description</th>
<th>Restrictions</th>
<th>Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Request List</td>
<td>Displays a list of service requests to the account user in a preconfigured Oracle Visual Builder Cloud Service list view. The presentation of a row can be edited.</td>
<td>None</td>
<td>Same as the Oracle Visual Builder Cloud Service list view.</td>
</tr>
<tr>
<td>Service Request Table</td>
<td>Displays a list of service requests to the account user in a preconfigured Oracle Visual Builder Cloud Service table. The columns of the table can be edited.</td>
<td>None</td>
<td>Same as the Oracle Visual Builder Cloud Service table view.</td>
</tr>
<tr>
<td>Service Request Creator</td>
<td>Provides a set of fields for creating a service request.</td>
<td>Create page for service request only</td>
<td>No specific configuration required, however, constituent components can be edited and removed as required.</td>
</tr>
<tr>
<td>Edit Service Request Data (One Column)</td>
<td>Provides a set of fields for editing standard service request data in a single column layout.</td>
<td>Edit page for service request only</td>
<td>No specific configuration required, however, constituent components can be edited and removed as required.</td>
</tr>
<tr>
<td>Edit Service Request Data (Two Column)</td>
<td>Provides a set of fields for editing standard service request data in a two-column layout.</td>
<td>Edit page for service request only</td>
<td>No specific configuration required, however, constituent components can be edited and removed as required.</td>
</tr>
<tr>
<td>View Service Request Data (One Column)</td>
<td>Provides a set of fields for viewing standard service request data in a single column layout.</td>
<td>View and edit pages for service request only</td>
<td>No specific configuration required, however, constituent components can be edited and removed as required.</td>
</tr>
<tr>
<td>View Service Request Data (Two Column)</td>
<td>Provides a set of fields for viewing standard service request data in a two-column layout.</td>
<td>View and edit pages for service request only</td>
<td>No specific configuration required, however, constituent components can be edited and removed as required.</td>
</tr>
<tr>
<td>Service Request Message Creator</td>
<td>Enables messages to be added to a service request.</td>
<td>View and edit pages for service request only</td>
<td>No specific configuration required, however, constituent components can be edited and removed as required.</td>
</tr>
<tr>
<td>Service Request Message List</td>
<td>Displays the messages that are associated with a service request.</td>
<td>View and edit pages for service request only</td>
<td>Same as the Oracle Visual Builder Cloud Service list view.</td>
</tr>
</tbody>
</table>
About the Service Request Creator Component

This topic describes the Service Request Creator component. The Service Request Creator component enables an account user to create service requests. You can specify default values for selected service request data. Also, you can determine whether the account user can update the default values.

The Service Request Creator component is used on the Create Service Request page in the Oracle Visual Builder Cloud Service Page Designer. The component is found in the Service Requests section of the Components tab.

About Fields

This table describes the fields that you can use with the Service Request Creator component. You can edit or remove these fields as needed.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>The default title for the service request.</td>
</tr>
<tr>
<td>Problem Description</td>
<td>The default problem description for the service request.</td>
</tr>
<tr>
<td>Product</td>
<td>The product to create the service request for.</td>
</tr>
<tr>
<td>Category</td>
<td>The default category to assign to the service request.</td>
</tr>
</tbody>
</table>
Configuring the Product Picker Component

This topic describes how to add products and product images to the product picker instance in your Digital Customer Service application.

Note: This topic is one of many required for the initial setup of Digital Customer Service. For more information about initial setup tasks required to get started with your Digital Customer Service application, see the related topics that follow.

About the Product Picker

The product picker enables you to display a number of product images on the page, so that a user can visually scan through the product images, and select one. Clicking the image, brings you to a Product Details page, where more details are included relating to the product. In the Reference Implementation, from this product details page, you can create an SR associated with the product.

Adding Products to the Product Picker

You must create products in Oracle Engagement Cloud before you can add products to the product picker in Oracle Visual Builder Cloud Service. All products are required to have a Product Number field specified in Oracle Engagement Cloud.

To add products to the product picker component:

1. Navigate to the Oracle Visual Builder Cloud Service.
2. Open your Digital Customer Service application.
3. Ensure that the Page Designer is in Design mode. You can switch between Live and Design modes with the toggle in the toolbar on the Page Designer.
4. In the Page Designer, click the Product Picker.
5. On the Product Picker property inspector, click the Data icon tab.
6. Click Setup Products.

   The Setup Products dialog box appears.
7. Click in the Select Products field.

   The Select dialog box appears.
8. Search by name, or navigate the product catalog to find the product, then click the product.
9. Click Select.
10. (Optional) To associate an image with the product in the product picker:

    a. Select the product in the Setup Products list.
    b. Upload the image that you want to associate with the product by doing one of the following:

        • Drag an image from your computer into the Upload an image box.
        • Click the Upload an image link, then browse and select the image from your computer.
11. Repeat steps 7-10 for each additional product you want to add.
Modifying Products in the Product Picker

You must create products in Oracle Engagement Cloud, and add them to the product picker in Oracle Visual Builder Cloud Service before you can modify the products in the list.

To modify products in the product picker component:

1. Navigate to the Oracle Visual Builder Cloud Service.
2. Open your Digital Customer Service application.
3. Ensure that the Page Designer is in Design mode. You can switch between Live and Design modes with the toggle in the toolbar on the Page Designer.
4. In the Page Designer, click the Product Picker.
5. On the Product Picker property inspector, click the Data icon tab.
6. Click Setup Products.
   The Setup Products dialog box appears.
7. To modify the order of the listed products in the product picker:
   a. Click the button with the three bars icon next to the product that you want to reorder.
   b. Drag the product to the new location in the list, and drop the product.
8. Repeat step 7 for all products that you want to reorder in the product picker.
9. To remove a product from the listed products in the product picker, click the delete (X icon) button next to the product you want to remove.
10. Repeat step 10 for all the products that you want to remove from the product picker.

Related Topics
- About Initial Digital Customer Service Setup
- About Application Configuration Settings

Setting Up User Administration Components: Procedure

To set up User Administration Components, perform the tasks in this topic.

The tasks outlined in this topic apply only to deployments where your Digital Customer Service application has been created using the Starter template.

Configuring Self-Service Users Component

You must set up the Manage Users and Add Roles pages to use the Self-Service Users component. To configure this component, perform the following tasks:

1. Navigate to your Oracle Visual Builder Cloud Service.
2. Open your Digital Customer Service application.
3. Click the Main Menu icon in the editor, and select Data Designer, then Business Objects.
4. Rename the Self-Service Role business object:
   b. From the list of business objects, expand Self-Service User, select the child Self-Service Role business object.
c. Update the value of the **Plural Label** field to Self-Service Roles by User.
d. Update the value of the **Singular Label** field to Self-Service Role by User.
e. Click **Save**.
f. Verify that the business object name is updated.

5. Navigate to the Page Designer.
6. Click **New Page** to create a new page.

The **Create Page** page is displayed.

- In the **Page Title** field, enter **Self-Service Users**.
- From the **Page Type** list, select **Landing**.
- Click **Create**.

The **Self-Service Users** page is displayed.

7. From the **User Administration** category in the **Components** palette, drag-and-drop the **Self-Service Users** component onto the newly created **Self-Service Users** page.
8. Select the **Self-Service User** page from the menu with list of available pages.
9. Click the page header, then in the **Property Inspector** pane, update the value for the **Page Header** text box to the following string:

```
Manage Self-Service User
```

10. From the **Common** category in the **Components** palette, drag-and-drop the **Paragraph** component at under the header.
11. Click the Paragraph field,, then in the **Property Inspector** pane, enter the following in the **Text** field:

```
Removing the User role causes the removal of all privileges. The user will no longer be able to use Customer Self-Service and will need to reregister to access the application again. Remove all other roles before removing the User role.
```

12. From the **Collection** category in the **Components** palette, drag-and-drop the **Table** component under the user fields. The **Table Creation** pane is enabled.

a. On the **Data** tab of the **Property Inspector** pane, select **Self-Service Role by User** to bind the table to the self-service role.
b. On the **Mapping** tab, select the **Account ID**, **Contact ID**, and **Relationship Type** fields, and move them to the **Selected** list.
c. Click the next arrow.
d. On the **Object Actions** tab, disable **Details** by selecting **Off**.
e. Click **Finish**.

13. Select the table after the table component is created.
14. In the **Property Inspector** pane, click the **Responsive** icon, and then deselect **Account ID** and **Contact ID**.
15. Repeat the previous step for each display mode in the **Set Properties For** list.
16. Click the **Create** button, then in the **Properties** tab of the **Property Inspector** pane, rename it to the following string:

```
Add Role
```

17. Click the **Actions** tab.
18. Click **Edit** and perform the following tasks:

a. Click the **Show JavaScript** button, and save the generated code on the page.
b. Click the **Show Recipe** button, and remove all default actions.

c. In the tab area, expand **Other Scripting**.

d. Drag-and-drop **Custom JavaScript Code** to the first line under the **When the user pressed the Add Role** component.

e. Click **Edit Custom Code**.

f. Use the following code as a guideline for what must be added:

```javascript
Note: Ensure that you modify the page name, archetype name, and entity name, to reflect the code that you saved in the first step.

```javascript

```javascript
return
Abcs.Pages().navigateToPage('createcom_oracle_abcs_fa_sr_selfServiceUsers_SelfServiceRolesPage',
    ContextualData.createStartWithBlankRecordContext({
        entityId: 'com.oracle.abcs.fa.sr.selfServiceUsers.SelfServiceRoles',
        data: new Record({
            AccountPartyId: $selfServiceUsers.getValue('AccountPartyId'),
            ContactPartyId: $selfServiceUsers.getValue('ContactPartyId'),
            ref2selfServiceUsers: self.Observables.com_oracle_abcs_fa_sr_selfServiceUsersEntityDetailArchetype.item._breeze_system_id()})}))
```

```javascript
g. Remove the following string from the code pasted in the previous step:

```javascript
$selfServiceUsers.getValue('AccountPartyId')
```

h. Select the **Account ID** field under **Self-Service User Fields**.

i. Remove the following string from the code pasted in the previous step:

```javascript
$selfServiceUsers.getValue('ContactPartyId')
```

j. Select the **Contact ID** field under **Self-Service User Fields**.

k. Click **Save**.

l. Enter a **Description**, and then click **Done**.

19. Switch the application to the **Live** mode.

20. Click **Add Role**.

21. Switch the application to the **Designer** mode.

22. Click the page title, then in the **Property Inspector** pane, update the value for the **Text** text box to the following string:

```javascript
Add Self-Service Role
```

23. Delete the **Account ID** and **Contact ID** fields.

24. Click the **Data** tab on the palette.

25. Drag-and-drop the **Relationship Type** field onto the page.

26. Click the **Relationship Type** field, then in the **Property Inspector** pane, update the value for the **Label** text box to the following string:

```javascript
Role
```

27. Click **Save and Close** on the pages.

28. In the **Property Inspector** pane, click the **Actions** tab.

29. Click **Edit** and do the following:

   a. Click the **Show JavaScript** button, and save the generated code on the page.

   b. Click the **Show Recipe** button, and remove all default actions.

   c. In the tab area, expand **Other Scripting**.
d. Drag and drop **Custom JavaScript Code** to the first line under the *When the user presses the Save and Close* component.

e. Click *Edit Custom Code*.

f. Use the following code as a guideline for what must be added:

```javascript
Note: Ensure that you modify the page name, archetype name, and entity name, to reflect the code that you saved in the first step.

self.Archetypes.com_oracle_abcs_fa_sr_selfServiceUsers_SelfServiceRolesEntityDetailArchetype.save(self.Archetypes.com_oracle_abcs_fa_sr_selfServiceUsers_SelfServiceRolesEntityDetailArchetype.getRecord()).then(function(saveOneRecordSuccessResult) {
  return Abcs.Pages().returnToPage(self.navigationContext.getPreviousPageId(), ContextualData.createRecordWasChangedContext({entityId: 'com.oracle.abcs.fa.sr.selfServiceUsers.SelfServiceRoles', data: saveOneRecordSuccessResult})).then(function() {
    return Promise.resolve(Abcs.UI().showNotification(Absc.UI().Notification.create({
      message: 'Role Created',
      level: Absc.UI().Notification.Level.SUCCESS
    })).then(function() {
    }})).catch(function(errorResult) {
  var errmsg = errorResult.getMessage ? errorResult.getMessage() : errorResult.message;
  if (errmsg === undefined) {
    return Promise.resolve(Abcs.UI().showNotification(Absc.UI().Notification.create({
      message: "Error: " + (errorResult.getMessage ? errorResult.getMessage() : errorResult.message),
      level: Absc.UI().Notification.Level.ERROR
    })).then(resolve);
  } else {
    var msg = errmsg;
    console.log("*****************************");
    console.log(msg);
    console.log("*****************************");
    Abcs.UI().showNotification(Absc.UI().Notification.create({
      message: AbscLib.i18n('businesscode.errorWithoutCode', msg),
      level: Absc.UI().Notification.Level.ERROR
    }));
  }
}).then(resolve);

});


g. Click *Save*.

h. Enter a *Description*, and then click *Done*.

### Configuring Registration Requests Component

To configure this component, perform the following tasks:

1. Navigate to your Oracle Visual Builder Cloud Service.
2. Open your Digital Customer Service application.
3. Click the **Main Menu** icon in the editor, and select **Data Designer**, then **Business Objects**.
4. Click **Self-Service Registration**.
5. In the Self-Service Registration screen, select the **Fields** tab.
6. Click the **New Field** menu, then select **Select from Service**.

The **Available Fields** dialog box appears.
7. Select the check boxes next to **ApproveActionDate**, and **ApproverPartyName**.
8. Click *Save*.
9. On the **Self-Service Registrations** page, click *Save*.
10. Click the **Main Menu** icon in the editor, and select **Page Designer**.
11. Click **New Page** to create a new page.

   The **Create Page** page is displayed.

12. In the **Page Title** field, enter the following text:

   Registrations

13. From the **Page Type** list, select **Landing**.

14. Click **Create**.

15. From the **User Administration** category in the **Components** palette, drag-and-drop the **Registration Requests** component.

16. Select the **Self-Service Registration** page from the list of available pages menu.

17. Rearrange the fields in the order you want.

18. Rename **Account Name** to **Account**.

19. Delete the **Reason** field.

20. From the **Component** palette, select **Text Area** from the **Field** section, and drop it on the page.

   A dialog box is displayed. Enter the following:

   a. Enter **Reason** in the **Label** field.

   ![Note: You can change the single line text to a text area if more space is required for entering the Reason.](image)

   b. Select **Self-Service Registration** under **Business Object**.

   c. Select **Existing** for the **Business Object Field**.

   d. Select **StatusMsg** for the **Field ID** field.

   e. Click **Save**.

21. In the **Property Inspector** pane, change the **Number of rows** field to the number of rows you would like displayed for the **Reason** field.

22. From the **Component** palette, select **Text Field** from the **Field** section, and drop it on the page.

   A dialog box is displayed. Enter the following:

   a. Specify the following string in the **Label** field: **Approver**.

   b. Select **Self-Service Registration Request** from the **Business Object** list.

   c. Select **Existing** from the **Business Object Field** list.

   d. Specify the following string in the **Field ID** field: **ApproverPartyName**.

   e. Click the check mark **Create** button.

23. From the **Component** palette, select **Date and Time** from the **Field** section, and drop it on the page.

   A dialog box is displayed. Enter the following:

   a. Specify the following string in the **Label** field: **Status Change Date**.

   b. Select **Self-Service Registration** from the **Business Object** list.

   c. Select **Existing** from the **Business Object Field** list.

   d. Specify the following string in the **Field ID** field: **ApproveActionDate**.

   e. Click the check mark **Create** button.

24. Select the **Edit Self-Service User** page from the list of available pages menu.

25. On the **Edit Self-Service Registration** page, delete the **Last Updated Date** field.

26. Rename **Account Name** to **Account**.
27. Click the Name field.
28. In the Property Inspector pane, select the Read-only check box.
29. Click the Email field.
30. In the Property Inspector pane, select the Read-only check box.
31. Rearrange the fields in the order you want.
32. Delete the Reason field.
33. From the Component palette, select Text Area from the Field section, and drop it on the page.

A dialog box appears. Perform these actions in the dialog box:

a. Specify the following string in the Label field: Reason.
b. Select Self-Service Registration Request from the Business Object list.
c. Select Existing from the Business Object Field list.
d. Specify the following string in the Field ID field: StatusMsg.
e. Click the check mark Create button.
34. In the Property Inspector pane, change the Number of rows field to the number of rows you would like displayed for the Reason field.
35. Select the Save button on the new page and delete it.
36. Click the Save and Close button on the new page.
37. In the Property Inspector pane, click the Actions tab.
38. Click Edit.

a. Click the Show JavaScript button, and save the generated code on the page.
b. Click the Show Recipe button, and remove all default actions.
c. In the tab area, expand Other Scripting.
d. Drag and drop Custom JavaScript Code to the first line under the When the user presses the Save and Close component.
e. Click Edit Custom Code.
f. Use the following code as a guideline for what must be added:

```javascript
// Note: Ensure that you modify the page name, archetype name, and entity name, to reflect the code that you saved in the first step.

click(function () {
  self.Archetypes.com_oracle_abcs_fa_sr_selfRegistrationsEntityDetailArchetype.save(self.Archetypes.com_oracle_abcs_fa_sr_selfRegistrationsEntityDetailArchetype.getRecord()).then(function(saveOneRecordSuccessResult1)
  {
    return Abcs.Pages().returnToPage(self.navigationContext.getPreviousPageId(),
      ContextualData.createRecordWasChangedContext({
      entityId: 'com.oracle.abcs.fa.sr.selfRegistrations',
      data: saveOneRecordSuccessResult1})).then(function()
    {
      return Promise.resolve(Abcs.UI().showNotification(Abcs.UI().Notification.create({
        message: "The registration request was updated for user ",
        level: Abcs.UI().Notification.Level.SUCCESS
      })))).then(function () {});
    });
  }).catch(function(errorResult) {
    var msg = errorResult.getMessage ? errorResult.getMessage() : errorResult.message;
    console.log("*****************************");
    console.log(msg);
    console.log("*****************************");
    Abcs.UI().showNotification(Abcs.UI().Notification.create({
      message: AbcsLib.i18n('businesscode.errorWithoutCode', msg),
      level: Abcs.UI().Notification.Level.ERROR
    }))
  });
});
```
Configuring Sign Up Component

To configure this component, perform the following tasks:

1. Navigate to your Oracle Visual Builder Cloud Service.
2. Open your Digital Customer Service application.
3. On the Page Designer page, click New Page to create a new page.
   The Create Page page is displayed.
4. In the Page Title field, enter Register.
5. From the Page Type list, select Create.
6. Click Next.
7. On the Create page, select Self-Service Registration from the list of business objects and click Create.
8. On the newly created page, delete the E-mail field.
9. From the User Administration category in the Components palette, drag-and-drop the Sign Up component.
10. Select the E-mail field on the page and enter hint text:

    After your registration request is approved, you will use your email to sign in.

11. Select the Account Key field and enter hint text:

    If you do not know your account key, contact your Customer Service Representative.

12. Select Save and Close and add your administrator-defined code:

    a. In the Property Inspector pane, click the Actions tab, then click the Edit button.
    b. Click the Show JavaScript button, and save the generated code on the page.
    c. Click the Show Recipe button, and remove all default actions.
    d. In the tab area, expand Other Scripting.
    e. Drag and drop Custom JavaScript Code to the first line under the When the user presses the Save and Close component.
    f. Click Edit Custom Code.
    g. Use the following code as a guideline for what must be added:

```
{
  return Abcs.Pages().returnToPage('homePage', ContextualData.createBlankPageContext()).then(function() {
    var status = saveOneRecordSuccessResult1['data']['StatusCd']['displayName'];
    console.log(status);
    if (status === 'ORA_CSS_APPROVED') {
      ...
    }

```
require('base/js/ui/UiUtils').showSuccessNoteWithManualClose("Your request to create a user account has been submitted. If you do not receive a confirmation email shortly, contact your Customer Service Representative");
} else if (status === 'ORA_CSS_PENDING') {
  require('base/js/ui/UiUtils').showSuccessNoteWithManualClose("Your request to create a user account has been submitted. Once processed by your administrator, you will receive a confirmation email. If you do not, contact your Customer Service Representative.");
}
})
}.catch(function(errorResult) {
var msg = errorResult.getMessage ? errorResult.getMessage() : errorResult.message;
Abcs.UI().showNotification(Abcs.UI().Notification.create({
  message: AbcsLib.i18n('businesscode.errorWithoutCode', msg),
  level: Abcs.UI().Notification.Level.ERROR
}))
}).then(resolve);

h. Click **Save**.
  i. Enter a **Description**, then click **Done**.

13. Click the **Save and Continue** button on the new page, then in the **Property Inspector**, click the **Delete Component** button.

### Configuring the My Profile Component

To configure this component, perform the following tasks:

1. Navigate to your Oracle Visual Builder Cloud Service.
2. Open your Digital Customer Service application.
3. On the Page Designer page, click **New Page** to create a new page.

   The **Create Page** page is displayed.

4. In the **Page Title** field, enter a meaningful name, for example **My Profile**.
5. From the **Page Type** list, select **Landing**.
6. Click **Create**.

   The **My Profile** page is displayed.

7. From the **Components** palette, drag-and-drop the **My Profile** component.
8. Select the list, then in the **Property Inspector**, click the **Data** tab.
9. In the **Property Inspector**, next to the **Default Query** field, click **Edit**.

   The **Edit Default Query** dialog is displayed.

   a. Select **Contact ID** from the **Select field** list.
   b. Select **Equals** from the operand list.
   c. Select **Expression** from the **Fill in the value text** list.

   The **Set Expression** dialog is displayed.

   i. In the **Global** tab, expand **dcsCommon fields**.
   ii. Click **UserPartyId**

      A string similar to the following will appear in the editor:

      ```
      $$dcsCommon.UserPartyID
      ```
   iii. Click **OK**.
   d. Click the **Save** check mark button.
For information about adding My Profile to a theme, refer to the Branding the Experience and Using Themes topic in the Related Topics.

Note: The Self-Service Users page and the Registration Requests page must be accessible only to account administrators.

Mapping Pages

To map the pages:

2. Click the Main menu icon, select Application Settings, and then select Security.
3. Under Pages, determine which user can access each page.
   a. For each page, determine whether authentication is required.
   b. For any page for which authentication is required, select the role that is required to access the page:
      • Select User if all authenticated users can access the page.
      • Select Account Administrator if only account administrators can access the page.

Related Topics

• Setting Up Administrators and Developers
• Branding the Experience and Using Themes

Configuring Category and Product Selector Components

This topic describes how to configure the Category Selector and the Product Selector components in your Digital Customer Service application.

Configuring the Display Mode for the Selector Components

The Display Mode option allows you to choose which way the selector is displayed. The options available are Dialog or Inline. The Dialog mode enables a dialog control for the selector, and the Inline mode enables a combination-box-style selection mechanism.

Note: For smaller screen mobile devices, the Dialog is used to make the component more accessible for lower resolution devices, even when the Inline mode is configured.

To configure the Display Mode option for the Product Selector and Category Selector components:

1. Navigate to the Oracle Visual Builder Cloud Service.
2. Open your Digital Customer Service application.
3. In the Page Designer, click the Product Selector or Category Selector.
4. On the Product Selector or Category Selector property inspector, click one of the following next to Display Mode:
   o Dialog. Display the selector as a dialog box.
Configuring the Selectable Option for the Product Selector Component

The Selectable option allows you to choose which type of Product or Product Groups can be selected in the Product Selector component. The options available are Products, Groups, or Both.

To configure the Selectable option for the Product Selector component:

1. Navigate to the Oracle Visual Builder Cloud Service.
2. Open your Digital Customer Service application.
3. In the Page Designer, click the Product Selector.
4. On the Product Selector inspector, click one of the following next to Selectable:
   - Products. Allows users to select from products.
   - Groups. Allows users to select from product groups.
   - Both. Allows the filter to be switched between Products and Product Groups when using the Filter functionality of the selector.

Keyboard Shortcuts for Selector Components

This topic provides information about keyboard shortcuts for selector components. Depending on how you build your Digital Customer Service application in Oracle Visual Builder Cloud Service, you might require more information by referring to one or more of the cross-references in this topic.

Expected keyboard shortcut actions for selector components are dependent on the keyboard shortcuts defined in the Oracle JavaScript Extension Toolkit (JET) component. Refer to the Keyboard Information section in the component-specific topic in the Oracle JavaScript Extension Toolkit (JET) Keyboard and Touch Reference to understand how to use keyboard shortcuts with a particular component. Refer to the following JET components for more information relating to keyboard shortcuts:

- ojDialog
- ojFilmStrip
- ojPagingControl
- ojRowexpander
- ojTable
- ojTree

💰 Note: The ojTree component is used only in the Resource Browser.

Related Topics

- Keyboard Shortcuts for ojDialog
- Keyboard Shortcuts for ojFilmStrip
- Keyboard Shortcuts for ojPagingControl
- Keyboard Shortcuts for ojRowExpander
• Keyboard Shortcuts for ojTable
6 Configuring Common Use Cases with Digital Customer Service

Securing Digital Customer Service

Adding Oracle Visual Builder Cloud Service Links for Password Reset

In your Digital Customer Service application, the My Profile component contains a Change Password link. Because the value that is required in the field is dependent on your Oracle Engagement Cloud deployment, by default the link value is empty. For this link to work for users, you must obtain the URL from your deployment of Oracle Engagement Cloud, and then specify the URL in your Digital Customer Service application. This topic describes how to obtain the URL, and then add it to your Digital Customer Service application in Oracle Visual Builder Cloud Service.

🔗 Note: The production Oracle Engagement Cloud URL and staged Oracle Engagement Cloud URL are different. Use the production Oracle Engagement Cloud URL for the tasks in this topic.

Obtaining the Change Password Link from Oracle Engagement Cloud

To obtain the Change Password link from Oracle Engagement Cloud:

1. Sign in to Oracle Engagement Cloud as a Digital Customer Service user.
2. Click the User menu and select Set Preferences.
3. Click the Password link.

   The password reset view appears.
4. In your browser, select the entire URL.
5. Copy the URL.

Specifying the Change Password Link in Your Digital Customer Service Application

To specify the Change Password link in your Digital Customer Service:

1. Navigate to the Oracle Visual Builder Cloud Service.
2. Open your Digital Customer Service application. Ensure that the Page Designer is in Design mode.

  🔗 Note: You can switch between Live and Design modes with the toggle in the toolbar in the Page Designer.
3. In the Page Designer, click the My Profile component.
4. On the Page Designer, click the Password field.
5. In the Properties tab, paste the Change Password URL that you copied in Oracle Engagement Cloud into the Link Target field.
6. Save your changes.
Adding the Sign-In Link Using a Theme

This topic explains how to add the Sign In link when you create a theme.

To add the Sign In link, perform the following tasks:

1. Sign in to Oracle Visual Builder Cloud Service and open your application.
2. Click the Main menu icon and select Application Settings.
3. Click Resource Browser.
4. In the Resource Browser pane, expand the user navigation tree.
5. Click extensions, then click dcsTheme, and then click theme.
6. Click the HTML template file for your theme, for example, user-area.html. The HTML code is displayed.
7. Add the following line in the appropriate area:

   `<theme-sign-in></theme-sign-in>`

   For example:

   <!-- ko if: userCanSignIn() -->
   <div class="abcs-pull-right">
   <theme-sign-in></theme-sign-in>
   <theme-sign-up></theme-sign-up>
   </div>
   <!-- /ko -->

8. Click Save Changes.

Related Topics
- Branding the Experience and Using Themes

Managing Registration Requests

Registration requests are sent to Oracle Engagement Cloud for users intending to use Digital Customer Service features. Administrators must then determine whether the request should be approved or rejected in the Service work area. This topic explains how to accept and reject registration requests in Oracle Engagement Cloud.

Approving Registration Requests

This topic describes how to approve registration requests in Oracle Engagement Cloud.

To approve registration requests:

1. Sign in as a user with a role that includes the Customer Self-Service Administrator duty role.
2. Navigate to the Service work area and click Registration Requests. The Self-Service Registrations screen is displayed. By default, a list of pending self-service registrations is displayed.
3. Click the Actions list, then select Approve.
4. Select one or more pending registration requests that you want to approve.
5. Click the Approve (# Selected) button.

Note: The number sign (#) represents the number of registration requests selected.
The **Requests to Be Approved** dialog box appears.

6. (Optional) In the **Reason for Approving** text box, enter a reason.

7. Click the **Approve** button.

   A message appears, confirming the number of approved registration requests. The approved requests no longer appear in the pending list.

   ✏️ **Note:** When a user registration request is approved, a welcome email is sent to the user with a password reset link.

### Rejecting Registration Requests

This topic describes how to reject registration requests in Oracle Engagement Cloud.

To reject registration requests:

1. Sign in as a user with a role that includes the Customer Self-Service Administrator duty role.
2. Navigate to the **Service** work area and click **Registration Requests**.

   The **Self-Service Registrations** screen is displayed. By default, a list of pending self-service registrations is displayed.

3. Click the **Actions** list, then select **Reject**.
4. Select one or more pending registration requests.
5. Click the **Reject (# Selected)** button.

   ✏️ **Note:** The number sign (#) represents the number of registration requests that you have selected.

   The **Requests to Be Rejected** dialog box appears.

6. In the **Reason for Rejecting** text box, enter a reason.

7. Click the **Reject** button.

   A message appears, confirming the number of rejected registration requests. The rejected requests no longer appear in the pending list.

### Managing Self-Service Users

Users can be granted different roles. By default, when a registration request is approved for a user, they are granted the User role. However, administrators can grant or remove roles, depending on the users intended responsibilities.

✏️ **Note:** The first user to be approved for a customer account is automatically granted the Account Administrator role. There must always be one user with the Account Administrator role for an account.

This topic describes how to add and remove roles for self-service users in Oracle Engagement Cloud. For additional information about self-service user roles, see About Digital Customer Service Roles.

To manage self-service roles for an account:

1. Sign in as a user with the Customer Self-Service Administrator role.
2. Navigate to the Service work area and click Self-Service Users.
3. From the Self-Service Users list, select the user you want to modify.
4. In the User Administration section, select or deselect one or more of the following roles:
   - User
   - Account Manager
   - Account Administrator

   **Note:** Removing the User role causes the removal of all privileges. The only way to restore the privileges is to submit a new registration request. You cannot delete the User role for the last Account Administrator because each account must have at least one administrator.

5. Click Save.

A dialog appears, confirming the role modifications.

**Related Topics**
- About Digital Customer Service Roles

### Creating Digital Customer Service User Accounts

This topic describes how to create users in the Digital Customer Service application.

#### Creating an Account Administrator

Each account must have at least one account administrator. You can assign the account administrator role to user accounts in your Digital Customer Service application.

To assign the account administrator role:

1. Sign in to your Digital Customer Service application as a user with the account administrator role.
2. Click the Self-Service Users icon.
3. On the Self-Service Users page, search for the user.
4. Click the Action menu associated with the user, then select Details.
5. On the Manage Self-Service User page, click Add Role.
6. On the Add Self-Service Role page, from the Role list, select Account Administrator.
7. Click Save and Close.

A Role Created confirmation message is displayed on the Manage Self-Service User page.

#### Creating an Account Manager

Each account must have at least one account manager. You can assign the account manager role to user accounts in your Digital Customer Service application.

To assign the account manager role:

1. Sign in to your Digital Customer Service application as a user with the account administrator role.
2. On the Self-Service Users page, search for the user.
3. Click the Action menu associated with the user, then select Details.
5. On the Add Self-Service Role page, from the Role list, select Account Manager.
6. Click Save and Close.

A Role Created confirmation message is displayed on the Manage Self-Service User page.

Localizing Digital Customer Service for Multilingual Support

This topic describes how to localize Digital Customer Service for multilingual support.

About Creating Localized Digital Customer Service Applications

You can create localized versions of your application by translating the UI text and messages in your application into other languages. The localized strings are displayed in the application during runtime. When you run the staged or published application, a localized version is displayed based on the language settings of your browser.

Note: A Digital Customer Service application created using the Reference Implementation template includes translations to the 22 languages supported by Oracle Engagement Cloud. While the Reference Implementation template is delivered with these translation strings and files, any modifications that you apply to the strings in your Digital Customer Service application requires additional translation.

The resource bundles provide an initial set of translated strings for the majority of the application that you can use for your own translation files. To populate the rest of the translation files for the languages you want to support, follow the instructions for generating files for new languages, and then use the existing translated files to obtain translations for use in your new file.

For more information about adding translated text to your application, refer to the Configuring Application Settings topic in the Developing Web Applications chapter in the Using Oracle Visual Builder Cloud Service Related Topic.

Creating Translations for New Languages

To introduce a new language beyond the ones delivered with a Digital Customer Service application that was created using the Reference Implementation, follow these steps:

1. Navigate to the Oracle Visual Builder Cloud Service editor.
2. Click the Main Menu icon in the editor, and select Application Settings, then Translations.
   The Translations page contains a Manage Language Bundles section and a Translations section.

   Note: English is not listed in the Translations list because it is considered the base language.

3. To download the latest language bundle, click the <Digital_Customer_Service_Application_Name>Nls.zip link in the Download current bundles section.
4. Open your <Digital_Customer_Service_Application_Name>Nls.zip file.
5. Extract the nls.json file.
6. Rename the nls.json file to nls-<language-locale>.json.

**Note:** The supported default language locales are as follows: cs-CZ, da-DK, de-DE, es-ES, fi-FI, fr-CA, fr-FR, hu-HU, it-IT, ja-JP, ko-KR, nl-NL, no-NO, pt-PL, pt-BR, ro-RO, ru-RU, sv-SE, th-TH, tr-TR, zh-CN, zh-TW. You can upload any language that you choose.

For example, for a file containing Swedish translations, the modified file name should be: nls-sv-se.json.

7. Open your nls-<language-locale>.json file in a text editor. The first few lines of the file will resemble the following:

```json
{
    "en" : {
        "base" : {
            "collections" : {
                "viewNotAllowedTitle" : "No Records Shown.",
                "viewNotAllowedDescription" : "You need view permission to view {entityName} business object.",
                "searchRequired" : "No records shown. Search is required.",
                "searchRequiredStart" : "Please provide required",
                "searchRequiredLink" : "Advanced Search",
                "searchRequiredEnd" : "details to find records."
            },
            "businesscode" : {
                "errorWithoutCode" : "Error: {0}",
                "errorWithCode" : "Error: {0} (Code: {1})"
            },
            "componentsCharts" : {
                "invalidPieParams" : "Chart slice values or colors are not specified.",
                "invalidBubbleParams" : "Bubble chart values for x or y axes or bubble size are not specified.",
                "invalidBarParams" : "Chart values or categories are not specified.",
                "propertyNotOnEntity" : "The field '{0}' referenced by a chart is not present on entity '{1}'."
            },
            "notAllRowsReturned" : "Only the first {0} rows from the query will be displayed in the chart titled '{1}'
        }
    },
    "businesscode" : {
        "errorWithoutCode" : "Error: {0}",
        "errorWithCode" : "Error: {0} (Code: {1})"
    },
    "componentsCharts" : {
        "invalidPieParams" : "Chart slice values or colors are not specified.",
        "invalidBubbleParams" : "Bubble chart values for x or y axes or bubble size are not specified.",
        "invalidBarParams" : "Chart values or categories are not specified.",
        "propertyNotOnEntity" : "The field '{0}' referenced by a chart is not present on entity '{1}'."
    },
    "notAllRowsReturned" : "Only the first {0} rows from the query will be displayed in the chart titled '{1}'"
}
```

8. Replace the "en" on the first line of the file to the language identifier of your choice. For example, you would enter "sv-SE" for a translation file containing Swedish translations.

9. Identify the strings that require translation by searching for the following string:

```
"pages" : {
    "All_Registrations" : {
        "button--560333972" : {
            "displayName" : "Create"
        }
    }
```

10. Replace the English strings with the translation for the language you are creating. Consider the search reveals the following pages string:

```
"pages" : {
    "All_Registrations" : {
        "button--560333972" : {
            "displayName" : "Create"
        }
    }
```

You would want to replace the string after the : “ with the translated language equivalent. In this example, you would want to replace the string Create with the Swedish equivalent for Create. The modified text will look similar to the following:

```
"pages" : {
    "All_Registrations" : {
        "button--560333972" : {
            "displayName" : "Skapa"
        }
    }
```
11. Repeat steps 9 and 10 for all the strings in the language that you are creating.
13. Create a new compressed file containing only the nls-<language-locale>.json file.
15. Click the Main Menu icon in the editor, and select Application Settings, then Translations.
16. Upload the compressed file containing your new nls-<language-locale>.json file to the Uploaded updated bundle section.

After the bundle is imported, the list of languages in the Translations section is updated. A Version # appears next to any language you upload. This can be a new language in a new file, or an update to an existing language in a previously existing file.

Adding New String Translations for Existing Languages

If you need to translate additional strings after modifying strings in your Digital Customer Service application generated from the Reference Implementation template, the nls-changes-<lang>-<LOCALE>.json file contains all the new or modified strings in English. Each language has its own nls-changes-<lang>-<LOCALE>.json file. For example, the file for French language strings requiring translation are found in the nls-changes-fr-FR.json file.

To add new string translations for existing languages:

1. Navigate to the Oracle Visual Builder Cloud Service editor.
2. Click the Main Menu icon in the editor, and select Application Settings, then Translations.
   
   The Translations page contains a Manage Language Bundles section and a Translations section.
3. To download the latest language bundle, click the <Digital_Customer_Service_Application_Name>Nls.zip link in the Download current bundles section.
4. Open your <Digital_Customer_Service_Application_Name>Nls.zip file.
5. Extract the file following file:
   
   nls-changes-<lang>-<LOCALE>.json

   Where <lang> is the abbreviation of the language of the language that requires language-related string translations.
6. Identify the strings that require translation by searching for the following string:
   
   ####

7. Replace the English strings with the translation for the language you are creating. Consider the search reveals the following pages string:

```
"pages" : {
  "All_Registrations" : {
    "button--560333972" : {
      "displayName" : "####Name####"
    }
  }
```

You want to replace the string, including the two sets of #### between the string, with the translated language equivalent. For example, if you were translating a French string, you would want to replace the string ####Name#### with the French equivalent for Name. The modified text will look similar to the following:

```
"pages" : {
  "All_Registrations" : {
    "button--560333972" : {
      "displayName" : "Nom"
    }
  }
```

8. Repeat steps 6 and 7 for all the strings in the language that you are updating.
10. Create a new compressed zip file containing only the nls-changes-<lang>-<LOCALE>.json file.
12. Click the Main Menu icon in the editor, and select Application Settings, then Translations.
13. Upload the compressed file containing your new nls-changes-<lang>-<LOCALE>.json file to the Uploaded updated bundle section.

After the bundle is imported the new and modified strings will appear as translated in the destination language.

For more information about updating translation files with new translated text for your application, refer to the Configuring Application Settings topic in the Developing Web Applications chapter in the Using Oracle Visual Builder Cloud Service Related Topic.

Switching Languages in a Staged Digital Customer Service Application

This topic describes how to enable switching languages in a Digital Customer Service application.

For more information about adding a language switcher to your application, refer to the topic relating to configuring application settings in the Using Oracle Visual Builder Cloud Service guide.

To enable language selection in a Digital Customer Service application:

2. Click the Main Menu icon in the editor, and select Page Designer.
3. Click the area on the upper part of the canvas.

The theme property area appears.

4. Select the Include language menu option.
5. Click the Main Menu icon in the editor, and select Stage.

Your Digital Customer Service application is staged.
6. Click the Main Menu icon in the editor, and select Run Staged Version.

Your staged Digital Customer Service application will open in a new window or tab.
7. Click the Default (Language) menu, and select a language.

Related Topics

• Using Oracle Visual Builder Cloud Service
7 Implementing Digital Customer Service Advanced Features

Overview of Digital Customer Service Advanced Features

This topic provides a general overview of Digital Customer Service from a development perspective.

Digital Customer Service is an application built with the Oracle Visual Builder Cloud Service platform. It’s preconfigured with a theme, pages, and functionality supporting a self-service experience. The drag-and-drop designer enables developers to quickly make changes and implement the look-and-feel of a brand.

As with any development framework, there can be restrictions when using ready-to-use components and capabilities. While Oracle Visual Builder Cloud Service is flexible and code can be written to accommodate many use cases, it’s recommended to use the packaged components as a first fulfillment of your requirements. If those components don’t meet your requirements, then try to extend the capabilities.

> Note: If you have modified your Digital Customer Service deployment, you must devise a product life cycle strategy to manage your own code migration and merges as well as uptake any environment changes.

Branding the Experience and Using Themes

This topic describes how to brand your own Digital Customer Service application by creating and using themes.

Branding your Digital Customer Service application requires you to develop HTML and CSS from your currently branded company web pages that are then modified to work within Oracle Visual Builder Cloud Service. In most cases, it requires work with a web developer to take existing HTML and CSS and implement it within a new template.

> Note: Oracle recommends creating the theme from the Simple Template as documented in this topic when you are creating your first theme. Using the Simple Template provides you with the base files.

For Web Developers, we also recommend that they become familiar with Oracle JavaScript Extension Toolkit (JET) as this JavaScript framework is implemented within the Oracle Visual Builder Cloud Service platform, themes and pages. Template files can be accessed within Application Settings in Resource Browser or Extension areas. Editing can be done within the provided text editor or you can export all files and use your own text editor. For file Lifecycle Management you must use a file management repository and merging strategy.

Creating and Activating a Theme

2. Click your application.
3. Click the Main menu icon and select Application Settings.
4. Click Extensions.
5. Click the Theme tab.
6. Click New Theme.
7. Click Create New.
8. Specify your Display Name and Extension ID. The Extension ID must be at least two groups of letters or numbers separated by period (.)

Note: The other field, AMD Package Name, will be populated with the value that you enter in the Extension ID field.

9. Click Template.
10. Select Simple Theme.
11. Click OK.
12. Select the Extension Active switch, to activate the theme.

For more information about creating a theme, refer to the Working with Application Extensions topic in the Using Oracle Visual Builder Cloud Service related link.

Editing a Theme to Include My Profile

Digital Customer Service applications that have been developed without the use of a Digital Customer Service template do not include the My Profile option for users. You can edit your theme to include the My Profile option for your users.

Before editing your theme you require the page ID for your My Profile page. For more information about creating the My Profile page, refer to the Setting Up User Administration Components topic in the Related Topics.

To determine the page ID of your My Profile page:

1. Switch to Page Designer.
2. Select the My Profiles from the page list.
3. In the Properties Inspector, locate the Page ID field.
4. Copy the value assigned to the Page ID field.

To add the My Profile option:

1. Sign in to Oracle Visual Builder Cloud Service and open your application.
2. Click the Main menu icon and select Application Settings.
3. Click Resource Browser.
4. In the Resource Browser pane, expand the user navigation tree.
5. Click extensions, then click dcsTheme, and then click theme.
6. Click the HTML template file for your theme, for example, user-area.html. The HTML code is displayed.
7. Add the following sample lines in the appropriate area. The argument assigned to the navigateToPage function should reflect the value you copied in Step 4 of the previous task.

```html
<!-- ko if: currentUserEmail() -->
  <div id="abcs-tpl-app-user-area-menu-container">
    <ul id="abcs-tpl-app-user-area-menu" data-bind="ojComponent: {component: 'ojMenu', select: navigateTo}"
        style="display:none">
      <li><a data-bind="text: 'My Profile', attr: {'id': 'My_Profile'}, click: function ()
        { Abcs.Pages().navigateToPage('My_Profile'); }, clickBubble: false"></a></li>
    </ul>
  </div>
<!-- /ko -->
```

For more information about creating a theme, refer to the Working with Application Extensions topic in the Using Oracle Visual Builder Cloud Service related link.
8. Click **Save Changes**.

**Related Topics**
- Using Oracle Visual Builder Cloud Service
- Setting Up User Administration Components: Procedure

### Setting Up the Error Handler

This topic describes how to set up the error handler for Digital Customer Service.

### About the Error Handler Settings

The Digital Customer Service theme extends the error handling of Oracle Visual Builder Cloud Service. Actions taken by a Digital Customer Service application when an error occurs while accessing external services, such as Knowledge Management, can be configured on a per-service basis.

Error Handler configuration is defined as a set of rules in the error-config.json file. Each rule has the following parts:

- **notes**
- **template**
- **errorPage/errorMessage**

The following code is an example of one of the default rules in the Digital Customer Service theme:

```json
{
  "notes": "Error contacting KM after auth token previously obtained",
  "template": {
    "event": {},
    "request": {
      "status": "regexp:^5[0-9][0-9]$/",
      "headers": {
        "kmauthtoken": "regexp:/.*/"
      }
    },
    "mode:RunTime:errorMessage": "Knowledge_Error"
  }
}
```
About the Notes Part of the Rule

The **notes** part is used to define the purpose of the rule. For example:

"notes": "General Fusion Service errors"

About the Template Part of the Rule

The **template** part is used to define a set of partial JavaScript Object Notation objects. These objects must match the arguments passed to the handler function that is used to call the `jQuery.ajaxError(handler)` function whenever an error occurs. For more information about the `jQuery.ajaxError(handler)` function, see the Related Topics. Any parts of the template child objects that are omitted are ignored when matching a rule to an error. For example:

```
"template": {
    "request": {
        "status": "regexp:/^5[0-9][0-9]$/"
    },
    "settings": {
        "url": "regexp:/\uri/associated/\SR/serviceApi/.*"
    }
}
```

The settings in this example would cause a rule to match if all of the following statements are true:

- The `ajaxError()` function is run with a `request.status` value of between 500 and 599.
- The `settings.url` value that matches URLs with a path including `/uri/associated/\SR/serviceApi/`

**Note:** Although templates can be defined to test any part of an AJAX error using this framework, in most cases, testing the status code, URL and request headers is sufficient for detecting most error conditions.

About the errorPage/errorMessage Part of the Rule

The **errorPage/errorMessage** part is used to define the ID of the `errorPage` to which to navigate. Also this part is used to define the `errorMessage` that is displayed when a rule match occurs. For example:

"errorPage": "Fusion_Service_Error"

The settings in this example would navigate the user to a page with ID `Fusion_Service_Error`.

The following is another example:

"errorMessage": "An error occurred when trying to access the widget generator service"

The settings in this example would display the following message "An error occurred when trying to access the widget generator service".

In addition, this field can be prefixed with `mode:RunTime` to indicate that the rule only applies at runtime or `mode:DesignTime` to indicate that the rule only applies at design-time. If the prefix is omitted, then the rule applies regardless of the environment in which the application is running.
Configuring Error Handler Settings

This topic describes how to configure error handler settings for your Digital Customer Service application in the Oracle Visual Builder Cloud Service.

1. Navigate to the Oracle Visual Builder Cloud Service editor.
2. Click the Main Menu icon on the editor, and select Application Settings, then Resource Browser.
3. In the Resource Browser, navigate to the user/extensions/dcsTheme/theme folder, then click error-config.json.
4. Configure your parameters.
5. Click Save Changes.

Note: Your Digital Customer Service application must be redeployed in order for the changes to be applied. Design-time specific changes can be applied by reloading the Oracle Visual Builder Cloud Service design-time in the browser.

Using the Error Handler in a Custom Theme

If your theme is based on the dcsTheme, where necessary you can reconfigure error handling for your Digital Customer Service application by modifying the error-config.json file as described in the previous topics. However, if you are working with a new custom theme that does not include the Digital Customer Service error handler code, you must perform the additional configuration to make use of Digital Customer Service custom error handling.

To use the error handler in a custom theme:

1. Note path to the directory of your custom theme.
2. Copy the user/extensions/dcsTheme/theme/error-config.json file, and paste it in the folder you noted in step 1.
3. Copy the user/extensions/dcsTheme/js/ErrorChecker.js file, and paste it in the folder you noted in step 1.
4. Copy the user/extensions/dcsTheme/js/ThemeProvider.js file, and paste it in the folder you noted in step 1.

Note: You must retain the definition of self._descriptor in the constructor function from your theme in the ThemeProvider.

5. Open the user/extensions/dcsTheme/theme/manifest.json file in your custom theme, and add the following line to the resources section:

   js/ErrorChecker.js

6. Click Save Changes.

Related Topics

- jQuery Ajax Error Handler

Using a Standard Business Object: Worked Example

This topic is an example of how to configure and use a standard Oracle Engagement Cloud business object for customer self-service product registration.
Worked Example Overview

This example provides an introduction to using business objects, APIs, data security, and mapping services within Oracle Visual Builder Cloud Service. This worked example is not intended to be a complete implementation and configuration, but rather acts as a quick introduction with general guidance.

Note: This is only a worked example. You must address more granular data security for each user in a production implementation. Additional role-based security might be required.

In this worked example, the following tasks will be described:

- Configuring Security to Enable Access and Data Access to the Asset REST API
- Testing Access to the API
- Mapping Oracle Visual Builder Cloud Service to the API
- Creating an Oracle Visual Builder Cloud Service Launch Page

Configuring Security to Enable Access and Data Access to the Asset REST API

In this topic, you will open the API.

Note: In a production implementation, additional configuration is required.

For more information about REST APIs refer to REST API for Oracle Sales Cloud R13, in the Related Topics.

You must access Oracle Engagement Cloud using an account with access to the Security Console. You will go into the security console and perform the following:

1. Sign-in to Oracle Engagement Cloud.
3. Select the Users tab.
4. Lookup and select a user with the administrator role.
   This user will become the account that you will use for the for REST API authentication. You must configure or update an existing role and then assign a user to that role.
5. Click Edit.
6. Click Add Role.
7. Search for, and add following role memberships:
   - View Asset - ZCM_VIEW_ASSETS_PRIV
   - Create Asset - ZCM_CREATE_ASSET_PRIV
   - Edit Asset - ZCM_EDIT_ASSET_PRIV
   - Delete Asset - ZCM_DELETE_ASSET_PRIV
8. Click Save and Close.

Use this account for REST API authentication.
Testing Access to the Asset REST API

In this part of the example you will use a third-party software tool to test access to the Access REST API that you configured in the previous topic. The example uses Postman, a free third-party software desktop tool. You can use an API testing tool of your choice.

Before testing the Asset REST API, you must know the following:

- **Your API domain.** If you are unsure of your API domain, contact your administrator. Your API domain will look similar to the following:
  
  https://aaaaaaaaa123-fa-ext.us.company.com/

- **The describe URL for your REST API endpoint.** It will look similar to the following:
  
  https:// aaaaaaaaa123-fa-ext.us.company.com/crmRestApi/resources/latest/assets/describe

To test access to your Asset REST API in Postman:

1. In the Get field, enter the full describe URL for your REST API endpoint.
2. Select Basic Auth from the Type menu.
3. In the User name field, enter the user you configured to access the Asset REST API.
4. In the Password field, enter the password of the user you configured to access the Asset REST API.
5. Click Send.

If you get an error or no data in the response, verify that you entered the proper describe URL, user, and password, then try again. If the problem persists, contact your administrator. Your Access REST API must respond to this test with a 200 response and a data return before continuing to the next task.

Mapping Oracle Visual Builder Cloud Service to the API

Within the Oracle Visual Builder Cloud Service designer perform the following.

1. Navigate to your Oracle Visual Builder Cloud Service.
2. Open your Digital Customer Service application.
3. Click the Main Menu icon in the editor, and select Data Designer, then Services.
4. Click Add Service.
5. Click Service Specification, then click Next.

The page is displayed.

6. On the Add Service screen, configure the service

   a. In the Name field, enter a meaningful name for the service.
   b. Select ADFm Rest from the Service Type list.
   c. Select Web Address from the Service Specification option.
   d. In the Service Specification text box, enter in the full describe REST API URL.
   e. Select Basic from the Service Specification Authentication Method list.
   f. In the User name field, enter the user you configured to access the Asset REST API.
   g. In the Password field, enter the password of the user you configured to access the Asset REST API.

7. Click Next.
8. Select the Asset business object.
9. Map the following fields:
Oracle recommends that you select only the fields that will be used for this connection. This helps to facilitate faster response times.

- Item ID
- Item Description
- Serial Number
- Purchase Date

10. Enter authentication credentials.
    For the purpose of this example, you can open the authentication for any user. In a production environment, you must set up proper security for each user role.

11. Test the connection.
    If you have completed all of the previous steps correctly, you will receive a data return. If not, before proceeding, revisit the previous steps and correct any errors until you receive a data return.

12. Click Finish.

Creating an Oracle Visual Builder Cloud Service Launch Page

Follow these steps to create a simple and functioning launch page using the data that was mapped from the Asset REST API in the previous tasks.

1. Navigate to your Oracle Visual Builder Cloud Service.
2. Open your Digital Customer Service application.
3. Click the Main Menu icon in the editor, and select Page Designer, then Services.
4. Click Home.
5. Click New Page.
6. Enter a meaningful title in the Page Title text box.
7. For the Page Type option, select the Landing option.
8. Click Create.
9. Open your new landing page, then drag-and-drop Table component from the Components palette onto your new landing page.
10. On the Table Creation palette, click the Asset business object.
11. Define the mapping of the table:
    a. Drag-and-drop Available fields to the Selected box.
    b. Click Next.
12. Define your object actions by toggling the switches in the Default Actions section.
13. Click Next.
14. Define your Options by modifying your Filter Options, Sort Options or entering a Table Summary.
15. Click Finish.

A preview of your landing page is displayed.

Related Topics
- Using Oracle Visual Builder Cloud Service
- REST API for Oracle Sales Cloud R13
8 Life Cycle Management

Determining Extension Versions

Digital Customer Service provides reusable components to your application through extensions delivered in a Component Application. These extensions may be updated periodically to provide bug fixes or additional features.

This topic describes how to determine your Digital Customer Service application extension version in Oracle Visual Builder Cloud Service.

To determine your Digital Customer Service application extension version:

1. Navigate to the Oracle Visual Builder Cloud Service editor.
2. Click the Main Menu icon in the editor, and select Application Settings, then Extensions.
3. Select an extension from the Extensions list.
4. In the extension Overview tab, next to the Display Name, text similar to the following is displayed:

   This Custom UI Component is owned and maintained in Application
   Digital_Customer_Service_Components-1.1.0

   The numbered suffix represents the version of your Digital Customer Service application extension. In this case, the version is 1.1.0.

About Updates

This topic describes updates and the different options available for updating Digital Customer Service.

Overview of Updates

When you build a Digital Customer Service application using either the Starter template or the Reference Implementation template, it’s associated with a specific version of the Digital Customer Service component application. The Digital Customer Service application you create will maintain a relationship link to that component application. Subsequently, as updates are delivered, you might decide to update your reference to an updated component application that delivers additional functionality or bug fixes.

The following are the two ways that updates can be applied to your Digital Customer Service application:

- Automatic Updates
- Elected Updates

About the Rules Governing Automatic and Elected Updates

The determining factor of whether an update is automatic or elected is the version number of the component application that is delivered. A component application version number has three digits, separated by periods. For example:

1.1.0

- The first digit represents the Major version.
• The second digit represents the Minor version.
• The third digit represents the Micro version.

The rules that determine whether an update is automatic or elected, are as follows:

• If the Major or Minor version number increments, an elected update is required.
• If only the Micro version number increments, the update is applied automatically when the first of the following two events occur:
  o When you open your Digital Customer Service in Design mode in Oracle Visual Builder Cloud Service.
  o When you stage your Digital Customer Service application in Oracle Visual Builder Cloud Service.

Related Topics
• About Digital Customer Service Terminology

Performing Updates

This topic describes how to update Digital Customer Service application extensions in Oracle Visual Builder Cloud Service.

About Automatic Updates

Automatic updates occur when a developer opens her Digital Customer Service application in the Oracle Visual Builder Cloud Service designer, after the platform has been updated with a new version of Oracle Visual Builder Cloud Service or Oracle Developer Cloud Service. Typically, updates are delivered on a monthly cadence, however, occasionally an update might be skipped. Feature updates occur quarterly, while bug fixes can be delivered monthly.

Performing Elected Updates

If your Digital Customer Service component application is updated with new features that require explicit uptake, Oracle Visual Builder Cloud Service alerts you that your application is referencing an outdated component application. You must perform an elected update.

To determine whether there is an updated Digital Customer Service component application with new features, and to perform the elected update to your application:

1. Navigate to the Oracle Visual Builder Cloud Service editor.
2. Click the Main Menu icon in the editor, and select Application Settings, then Extensions.
3. Select an extension from the Extensions list.
4. In the extension Overview tab, next to the Display Name, text similar to the following is displayed, when updates are available:

   You have multiple extensions from
   Digital_Customer_Service_Components-1.0.2 you can update.
   Update All from Digital_Customer_Service_Components-1.0.2

5. Click Update All.