.

RAINBOW CRM BRIDGE - DEPLOYMENT GUIDE (New York)

Rainbow CRM Bridge



Legal Notice

Alcatel-Lucent, ALE International and the Alcatel-Lucent logo are trademarks of ALE International. All other trademarks are the property of their respective owners. The information presented is subject to change without notice. ALE International assumes no responsibility for inaccuracies contained herein.

Copyright © 2020 ALE International - All rights reserved.

Index

1	Document History						
2	2 Introduction						
3	3 ServiceNow Integration						
	3.1	OpenFrame Installation	6				
	3.2	OpenFrame Configuration	8				
	3.3	Whitelisting RCB for cross-domain communication using OpenFrame	10				
	3.4	Whitelisting RCB for cross-origin REST API access	11				
	3.5	Click to Call (C2C) Configuration	12				
4	Ар	plication in Expanded and Collapsed mode	15				
	4.1	Rainbow CRM Bridge widget in maximized (visible) mode	15				
	4.2	Rainbow CRM Bridge widget in minimized(hidden) mode	15				
5	Rai	inbow CRM Bridge access authorization	16				

1 Document History

Edition	Date	Changes / Comments / Details			
01	03/03/2020	Initial deployment guide			
02	04/03/2020	C2C configuration screenshots updated			
03	05/03/2020	C2C configuration screenshots updated			
04	05/03/2020	Rainbow CRM Bridge access authorization			
05	27/03/2020	Rainbow CRM Bridge access URL updated			

2 Introduction

Rainbow CRM Bridge acts as a middleware that connects third party CRMs e.g. ServiceNow, MS Dynamics 365 etc. with ALE Rainbow. Rainbow CRM Bridge is hosted in ALE Cloud and works inside third-party CRMs as an integrated component.

The integrated version of Rainbow powered by Rainbow CPaaS APIs, eliminates the need of a separate desktop application and brings the power of Rainbow inside the everyday business applications like ServiceNow.

Rainbow CRM Bridge uses the CPaaS platform to pulls Rainbow user details e.g. Contacts, Conversations and Bubbles. This enables the logged in user to receive Rainbow Calls, Office PBX calls and perform variety of actions including Audio and Video calls.

For more details on Rainbow CRM Bridge, please refer to the datasheet.



3 ServiceNow Integration

3.1 OpenFrame Installation

Sign-in to ServiceNow



Search Plugins in the left search box



Type Openframe in top search on the page

Servicenow. Service Management								
Plugins		⊗	All Applications					
ē	*	©	FILTERS	Q Openframe				
System Definition	n		Managing Installed	1 results for "Openframe"				
Plugins			Not Installed					
			Updates					

Click Install button

A dialogue box will open, click Activate button from the dialogue box.



It will take few minutes to finish installation

Plugin Activation	
Openframe	Preparing to activate plugin, this may take a while

After installation, a confirmation/Success message will be displayed

Plugin Activation	
Success Openframe was activated	
	View Logs View Plugin List Close & Reload Form

Once the installation is complete, Reload the page and type OpenFrame in the left search box, and Select

OpenFrame from search result

Servicenow Service Management	servicen()W service Management								
💎 openframe 🛞	All Applications		C Find in Store	Request Plugin					
e \star 🕓	FILTERS	٩							
System Properties OpenFrame	Managing Installed Not Installed	817 results	Sort by A - Z	•					
	Updates Vricing Free Paid	Action Status Automation Contomer Service Management This plugin tracks blocking records created for tasks and updates the action status indicators on the task list. ID consul, action, status Paid by Servicative	Install						
	Product family If Service Management If Dusiness Management Rik Security Now Platform Customer Service Service	Activity formatter Other Quickly and easily filter the lot of activities, or hotory, on a task form III: com gide ai_activity_termatter tree by ServiceIline	Installed	:					

3.2 OpenFrame Configuration

Click on New button to create a new configuration

Servicence Management								
openframe		۲	=	OpenFrame	Configu ations	New	Search	Order
ē	*	0	7	All				
System Propertie	s		হ্য	Q	≡ Name			
OpenFrame								

In the New configuration form, specify the following and click Submit button.

F :-1-1		
Field	Value	
Name	Rainbow CRM Bridge	
Title	Rainbow CRM Bridge	
User Group	Do not select any group, so that the RCB is available to all the users.	
URL	https://servicenow.openrainbow.io/#/	
Active	Enabled (Checked)	
Width	500	
Height	500	
Icon Class	icon-phone	
Name	Rainbow CRM Bridge	
Title	Rainbow CRM Bridge * Width	500
Subtitle	* Height	500
Order	Icon Class Icon phone	
Enable collapsed view	Title icon	8
User Group A	waitable Selected	Selecting
	ATF_TestGroup_Network ATF_TestGroup_ServiceDesk Application Development CAB Approval Capacity Mgmt Capacity Mgmt Catalog Request Approvers > 51000 Catalog Request Approvers for Sales Change Management Database	↑ selecting
URL F	https://servicenow.openrainbow.io/#/	â

Field	Description
Name	The name of the OpenFrame configuration.
Title	The title that appears in the OpenFrame window header.
User Group	The user groups selected for this configuration. Access to this configuration is limited to the users that have the OpenFrame user role and that belong to the selected groups. Note: If you do not select any groups, the configuration is available to all users with the OpenFrame user role.
URL	The URL to be launched within OpenFrame. This URL can be an absolute path or a path that is relative to the ServiceNow instance.
Active	Denotes this configuration as active.
Width	The width of the OpenFrame window.
Height	The height of the OpenFrame window, not including the OpenFrame header height.
Icon Class	The class of icons used for the OpenFrame window (retina-icons.css). Only supports icon- phone and icon-video values.

Note: Given below is a detailed description of the fields available for OpenFrame configuration.

Click Submit and reload the page. If OpenFrame is configured properly; it would display telephone icon in the top bar.



3.3 Whitelisting RCB for cross-domain communication using OpenFrame

Type "sys_properties_list.do" in the left search box and hit Enter.

Servicenow. Service Management								
Sys_propert	ies_list.do	8		OpenFrar	ne Configurations New	Searc		
٦	*	Ø		All				
			83 	Q	Name Rainbow CRM Bridge			
				Action	s on selected rows V			

It will open a page containing a list of system properties.

Type glide.ui.concourse.onmessage_enforce_same_origin_whitelist in the name search field and hit Enter.

_						
)	≡	System Properties	New	Search	Name	glide.ui.concourse.onm(

Click property (first record from top)

\bigtriangledown	All>Name>=glide.ui.concourse.onmessage_enforce_same_origin_whitelist								
Q		Name ▲	≡ Value						
		Search	Search						
	i	glide.ui.concourse.onmessage enforce same origin whitelist							
	i	glide.ui.confirm cascade_delete	true						

Add https://servicenow.openrainbow.io in value field. Click Update button.



3.4 Whitelisting RCB for cross-origin REST API access

Type "CORS Rules" in the left search box.

Service Management					
Cors Rules	8				
⊡ ★	0	۲ ۲			
System Web Services					
▼ REST					
CORS Rules					

Click New button on the top, a new form will open. And configure filed like that

	Field		Value	
	Name		RCB	
	Domain		https://servicenow.openrainbow.io	
	REST API		Table API[now/table]	
	HTTP Me	thods	check all (GET, POST, PUT, PATCH and DELETE)	
	* Name	RCB	Application	Global
	* Name * REST API	RCB Table API [now/	Application Application	Global
	* Name * REST API * Domain	RCB Table API (now/ https://ser	Table) Vicenow.openrainbow.io	Global
	∦ Name ★ REST API ★ Domain Max age	RCB Table API (now/ https://ser	Application table) vicenow.openrainbow.io 0	Global
HTTP Methods	* Name * REST API * Domain Max age HTTP Headers	RCB Table API (now/ https://ser	Application tablej vicenow.openrainbow.io 0	Global
HTTP Methods	* Name * REST API * Domain Max age HTTP Headers GET	RCB Table API (now) https://ser	Application table] vicenow.openrainbow.io 0 PATCH	Global
HTTP Methods	* Name * REST API * Domain Max age HTTP Headers GET POST	RCB Table API (now/ https://ser	Application table] vicenow.openrainbow.io	Clobal

and click Submit button

3.5 Click to Call (C2C) Configuration

Type "UI Macro" in the left search box, select under "system UI" the page "UI Macros" and Click New button available on top.

🕎 ui macro	⊗		lacios	New Sea ch Name		
★	0		All			
System Diagnostics		<u>نې</u>	Q	■ Name ▲		
System Diagnostics			(j)	Sadmin console reports		
V Session Debug			0			
Debug III Macro			(j	<u>\$pwd_csrf_validation</u>		
Debug of Macro				found display, password		
Disable UI Macro Debug			0	<u>spwd_display_password</u>		
Svstem UI			(j	<u>Spwd done button</u>		
UI Macros			í	<u>Spwd enroll email ui</u>		
			0			

Add "RCB_C2C" in name field, Description and replace the default XML code with the following XML code and then click Submit button.

```
<?xml version="1.0" encoding="utf-8" ?
<j:jelly trim="false" xmlns:j="jelly:core" xmlns:g="glide" xmlns:j2="null" xmlns:g2="null">
                              trim="false" xmins.j="jeily:core" xmins.g="gite" xmins.j=" mult xmins.g=" mu
                              <script>
                             function dialContact(reference) {
                                                                                              var s = reference.split('.');
                                                                                             var tableName = s[0];
var referenceField = s[1];
                                                                                             var incidentId = g_form.getUniqueValue();
var callerId = g_form.getValue(referenceField);
                                                                                              var contact;
                                                                                              var gr = new GlideRecord('sys_user');
                                                                                              if (gr.get(callerId)) {
                                                                                                                             contact = {
                                                                                                                                                             "incidentId": incidentId,
                                                                                                                                                             "first_name": gr.first_name,
"last_name": gr.last_name,
                                                                                                                                                              "email": gr.email,
                                                                                                                                                              "phone": gr.phone,
                                                                                                                                                             "mobile_phone": gr.mobile_phone
                                                                                                                             };
                                                                                              ł
                                                                                              var payload = { "type": "C2C", "data": contact };
                                                                                              var context = { "payload": payload, "method": "openframe_communication" };
                                                                                              CustomEvent.fireAll("openframe_request", context);
                                                              }
                              </script>
</j:jelly>
```

Like that:

	System Administrator •	6	Q II () ()
(ul macro 🛞 🤇 = Macro New record		ß	Submit
🖻 🛨 🕚 * Nam	RCB_C2C Application Global	0	
System Diagnostics	Active 🗸		
V Session Debug Description	Show phone icon for contact field on case form, icon will be shown only if contact.phone value is not empty.		
Debug UI Macro			
Disable UI Macro Debug			
System UI	<pre>Open version="1.8" encoding="uff.8" >> 3 (jijelly trim="felse" unlesij="jelly:core" unlesig="glide" unlesigl="mull">ull"></pre>		
UI Macros Protection poli	<pre>quenalate ver_jour_goid expression="gi_generation[Util])' /> gi_generemeng_decontin les'(jour_goi)'(did="g(ref)') gi_generemeng_decon</pre>		

Type "Incident" in the left search box. Open "Incidents" under Service desk.

Service Management									
☐ incident		Incidents	New Search	Number 🔻	Search				
		All > Activ	e = true				1		
Favorites	ঞ	Q	≡ Number ▼	≡ Opened	■ Short description	≡ Caller	Sort (a to z)	≡ State	≡ Cate
0 Incidents			Search	Search	Search	Search	Sort (z to a) Show Visual Task Board	Search	Search
Self-Service		i	INC0010019	2020-03-04 19:42:41	Device iot\$thingy\$F9:2D:97:49:FD:B7 reporting measure	(empty)	Ungroup Group By Caller	New	Network
Incidents		(j)	INC0010018	2020-03-04 15:44:13	Device iot\$thingy\$F9:2D:97:49:FD:B7 reporting measure	<u>Richard Elliot</u>	Bar Chart	Vew	Network
Watched Incidents		í	INC0010017	2020-03-02 13:49:43	Device iot\$thingy\$E4:97:C4:C4:71:66 reporting measure	(empty)	Configure >	u List Lavout	Notorra
Service Desk		i	INC0010016	2020-02-28	Device iot\$thingy\$FD:CB:F1:CA:F3:D0	(empty)	Import	List Calculation	ns rk
Incidents		(j)	INC0010015	2020-02-27 16:47:26	Device iot\$thingy\$FD:CB:F1:CA:F3:D0 reporting measure	(empty)	Update Selected	All	rk
Create New		í	INC0010014	2020-02-25 15:27:35	Device iot\$thingy\$FD:CB:F1:CA:F3:D0 reporting measure	(empty)	Create Application Files	Security Rules	rk
Assigned to me		í	INC0010013	2020-02-25 10:54:23	Device iot\$thingy\$FD:CB:F1:CA:F3:D0 reporting measure	(empty)	Show XML	Workflows Flow Designer	rk Flows
Open		í	INC0010012	2020-02-20 15:44:57	Device iot\$thingy\$E4:97:C4:C4:71:66 reporting measure	<u>Alissa Mountjo</u> y	ι 5 - Planning	Client Scripts	rk
Open - Unassigned		i	INC0010011	2020-02-20 11:15:54	Device iot\$thingy\$E4:97:C4:C4:71:66 reporting measure	(empty)	5 - Planning	Data Policies	rk
Resolved		í	INC0010010	2020-02-20 11:14:59	Device iot\$thingy\$TEST reporting measure	(empty)	5 - Planning	Notifications Dictionary	rk

Click caller's column option, select Configure option from the dropdown menu and then click Dictionary

Click "incident" against the column name "caller_id"

Ţ	➡ All > Table = incident .or. Table in incident, task					
袋		≡ Table ▲	≡ Column name	≡Туре	≡ Refere	
	i	incident		Collection	(empty)	
	i	incident	business_stc	Integer	(empty)	
	í	<u>incident</u>	calendar_stc	Integer	(empty)	
	í	<u>incident</u>	caller_id	Reference	<u>User</u>	
	÷	incident	category	String	(empty)	

and replace the text from attributes field with:

encode_utf8=false,ref_contributions=RCB_C2C;user_show_incidents"

★ Table	Incident [incident]	•	
⊁ Туре	Reference	Q	()
⊁ Column label	Caller		
K Column name	caller_id		

Alters the behavior of a field or functionality that depends on the field. <u>More Info</u>					
	Attributes	encode_utf8=false,re	f_contributions=RCB	_C2C;user_show	_incidents
Reference Specification	Choice List Specification	n Dependent Field	Calculated Value	Default Value	
The Reference field spec	cifies what table this field	displays values from.			
* Reference User					
Use reference qualifier Simple					

and then click Submit button.

RCB has now been configured for the ServiceNow instance.

Please refresh your page to start using RCB application.

4 Application in Expanded and Collapsed mode

4.1 Rainbow CRM Bridge widget in maximized (visible) mode



4.2 Rainbow CRM Bridge widget in minimized(hidden) mode

servicenow. Service Management	ervicen OW. Service Management					
Filter navigator	+ System Administration •		\$ \$			
► ● Self-Service ^ Homepage ●	Make your life easier, create a dashboard! Did you know you can create a dashboard version of this homepage? Dashboards are like home view and collaborate on dashboards with you!	Nove, and resize widgets. You can also add multiple tabs. Flexible sharing lets any user				
Business Applications	Don't ask me again Remind me later		Create dashboard version			
Service Catalog		System Administration				
Knowledge	Guided Setup	System Security	Business Logic			
Visual Task Boards Connect Chat	Guided Setup tools to help you set up ServiceNow	Configure and monitor instance security settings	Manage workflow and behavior of applications			
Incidents	Create and Deploy	Data Management	Diagnostics			
Watched Incidents	Create, modily and deploy applications to your instances	Manage the way data is stored and displayed	Performance, development and debugging tools			
My Requests Requested Items	Email	Homepages Configure to processors for Examples Dark and Call Examples uncorr	Integration			
Watched Requested Items	Email Customize behavior of inbound and outbound email	Configure homepages for Service Desk and Self Service users	Integration Integrate with 3rd-party systems and data sources			

Note: To open minimized Rainbow CRM Bridge widget, click on telephone icon that is available on the top right.



5 Rainbow CRM Bridge access authorization

Type "users and Groups" in the left search box. Open "Groups" under "users and Groups".

Servicence Management			
Users and Groups	8		
▣ ★	C		
System Security			
▼ Users and Groups			
Users			
Groups			
Roles			
Access Role Detail View			

In the name search field type the Group name associate to your users like: "Incident.Manager" and hit Enter. Select "Roles" tab and click on Edit button to open the Group Roles selection windows

Reles	Grot p Me	embers (1) Groups	
	Roles E	lit Sea ch Created ▼ Search	
\bigtriangledown	Group = Ir	ncident Management	
ঞ্চ	Q	\equiv Created	≡ Role
ঞ্চ	Q	≡ Created	≡ Role

In the Collection search field type "sn_openframe" select "sn_openframe_user". Push it on the Roles List and Save.

Add Filter Run filter 🕐		
choose field 🔻 🔻	oper 🔻	- value
Q sn_openframe sn_openframe_user	Roles Lis eDemo agent email	st _workspace_user
	incider itil sn_inc templa	nt_manager cident_read cident_write late_editor
	•	
Name sn_openframe_user	Cancel Save	

Select the Group Members tab

Ro es (1) Group Members (4)	Groups				
Group Members Rew	Edit.	Search	User	•	Search
Group = Team Developm	nent Code R	eviewers			
భ్తు Q ≡ User					

Select Edit to open the selection windows. Select users authorized in the Collection list. Push it on the Group Members List on the right and click Save.

choose field	▼ oper	▼ value	
Collection		Group Members List	
QI		Incident Management	
Abel Tuter Abraham Lincoln Adela Cervantsz agent1 eDemo agentwf1 eDemo agentwf1 eDemo agentwf2 eDemo Aileen Mottern Alejandra Prenatt Alejandro Mascall Alene Rabeck Alfonso Griglen Alissa Mountjoy		Incident Manager	
Allan Schwantd Allie Pumphrey			
Allyson Gillispie Alva Pennigton			

Log out administrator and log in with one agent of the Group Member list to check if the telephone icon is available on the top right.

enterprise.alcatel-lucent.com

Alcatel-Lucent and the Alcatel-Lucent Enterprise logo are trademarks of Alcatel-Lucent. To view other trademarks used by affiliated companies of ALE Holding, visit: enterprise.alcatel-lucent.com/trademarks. All other trademarks are the property of their respective owners. The information presented is subject to change without notice. Neither ALE Holding nor any of its affiliates assumes any responsibility for inaccuracies contained herein