

RAINBOW CRM BRIDGE - DEPLOYMENT GUIDE (New York)

Rainbow CRM Bridge



Rainbow™

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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.

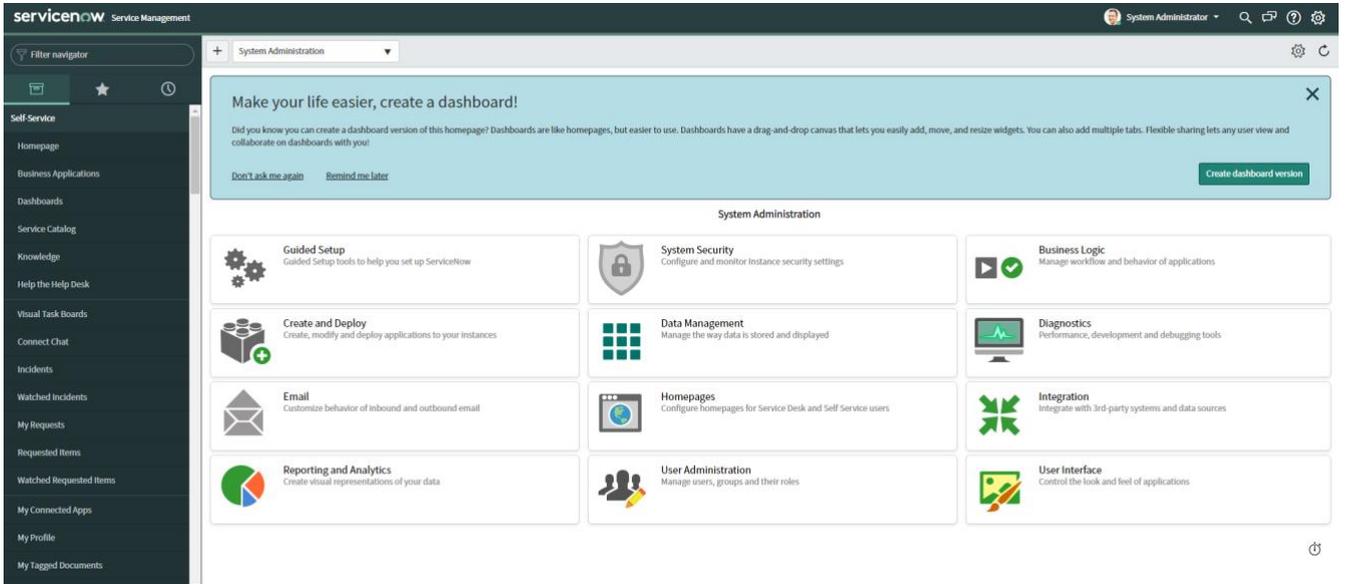
Rainbow CRM Bridge uses the CPaaS platform to pull Rainbow user details e.g. Contacts, Conversations and Bubbles. This enables the logged in user to receive Rainbow Calls, Office PBX calls and perform variety of actions including Audio and Video calls.

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

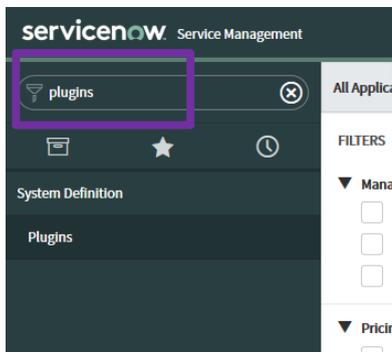
3 ServiceNow Integration

3.1 OpenFrame Installation

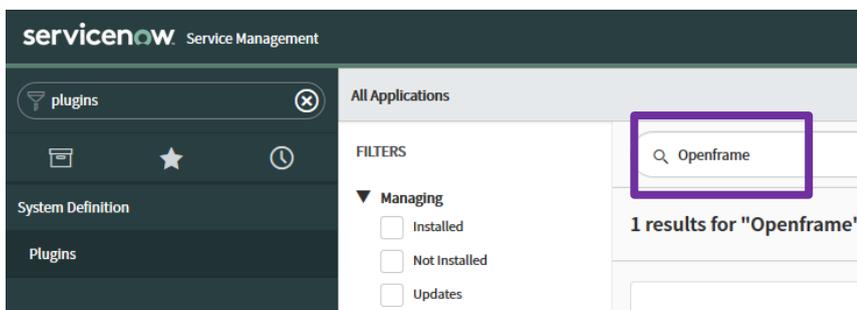
Sign-in to ServiceNow



Search Plugins in the left search box

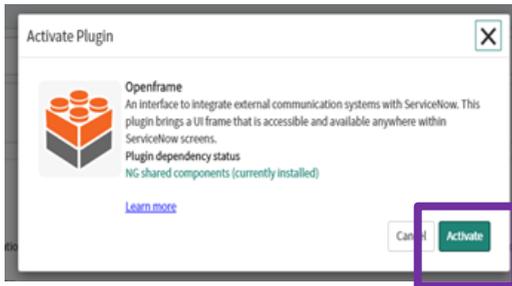


Type Openframe in top search on the page

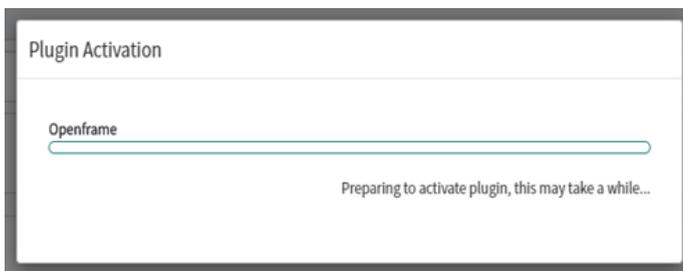


Click Install button

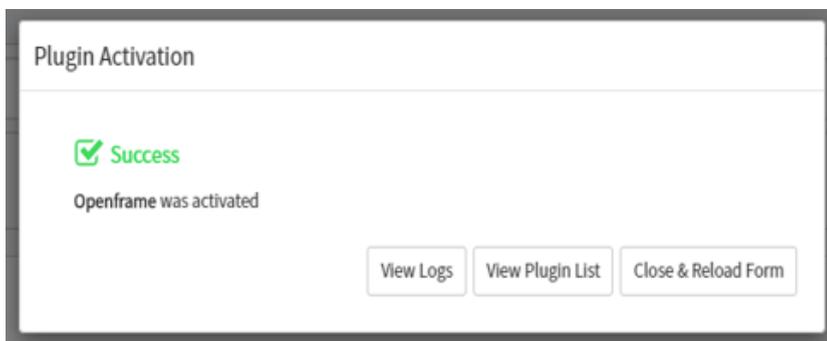
A dialogue box will open, click Activate button from the dialogue box.



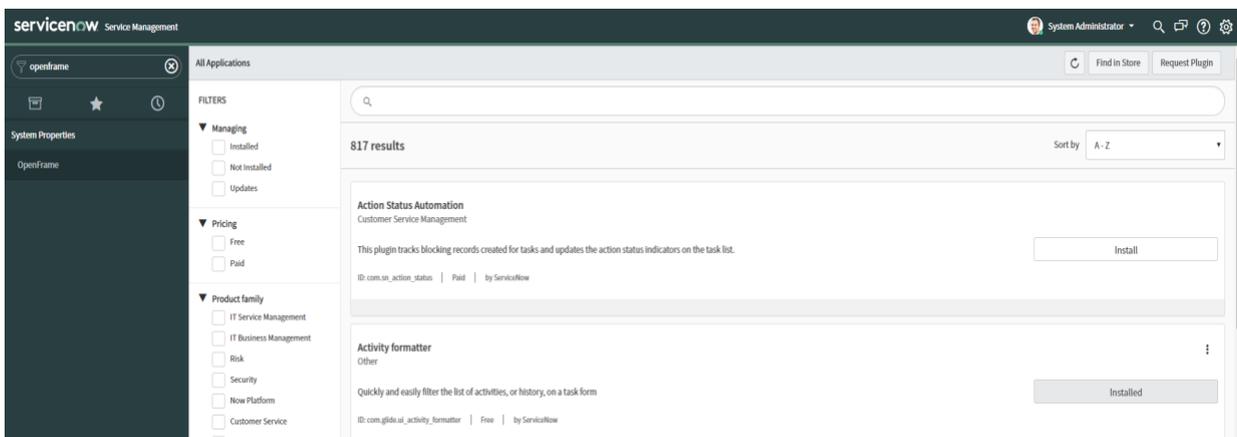
It will take few minutes to finish installation



After installation, a confirmation/Success message will be displayed

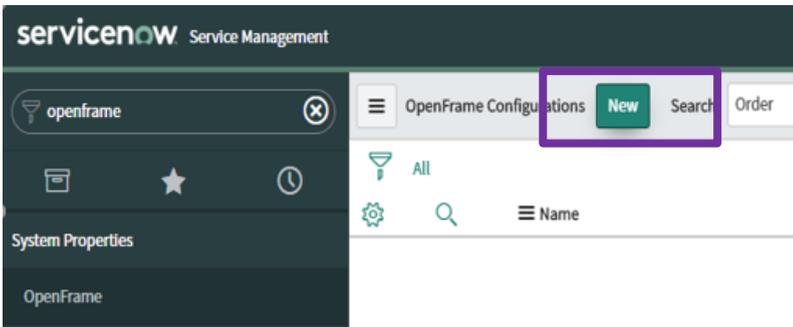


Once the installation is complete, Reload the page and type OpenFrame in the left search box, and Select OpenFrame from search result



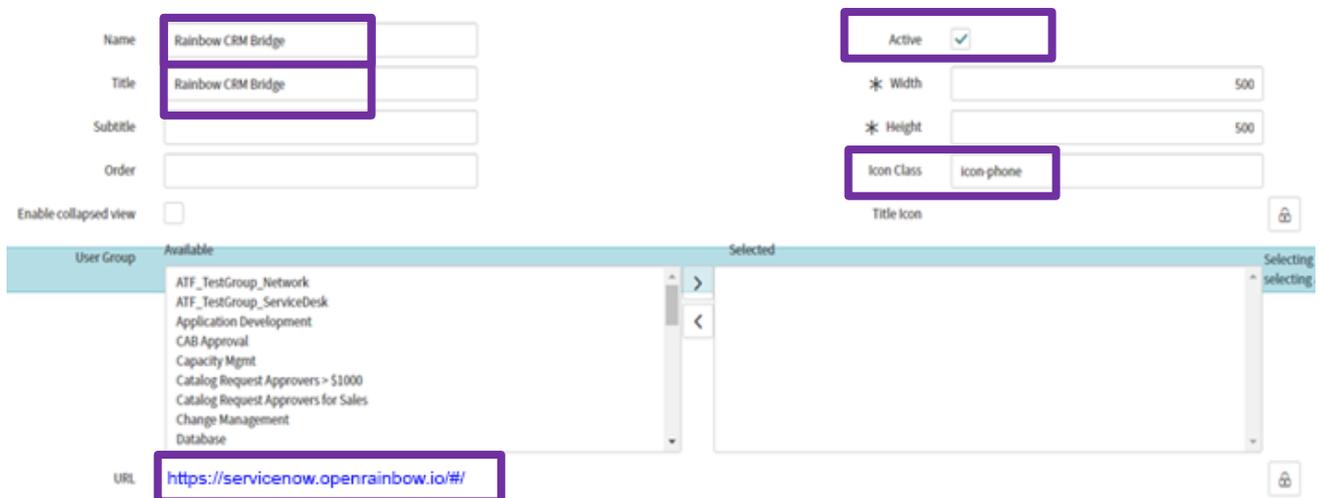
3.2 OpenFrame Configuration

Click on New button to create a new configuration



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

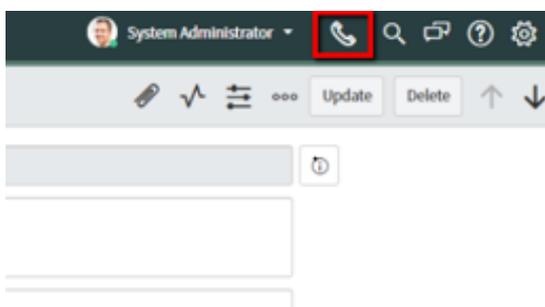
Field	Value
Name	Rainbow CRM Bridge
Title	Rainbow CRM Bridge
User Group	Do not select any group, so that the RCB is available to all the users.
URL	https://servicenow.openrainbow.io/#/
Active	Enabled (Checked)
Width	500
Height	500
Icon Class	icon-phone



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

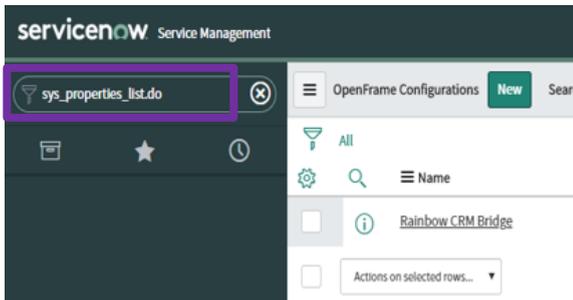
Field	Description
Name	The name of the OpenFrame configuration.
Title	The title that appears in the OpenFrame window header.
User Group	The user groups selected for this configuration. Access to this configuration is limited to the users that have the OpenFrame user role and that belong to the selected 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.

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



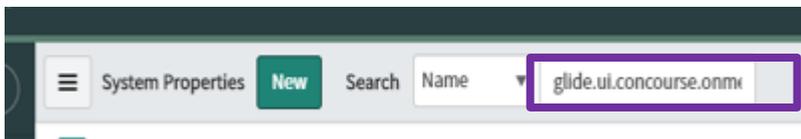
3.3 Whitelisting RCB for cross-domain communication using OpenFrame

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



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.



Click property (first record from top)

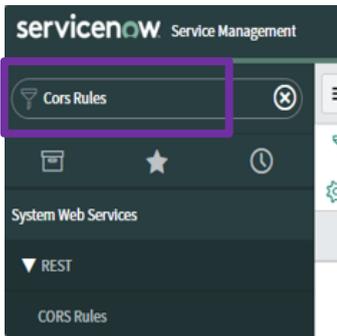
All > Name >= glide.ui.concourse.onmessage_enforce_same_origin_whitelist	
Name	Value
glide.ui.concourse.onmessage_enforce_same_origin_whitelist	
glide.ui.confirm_cascade_delete	true

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

Name	glide.ui.concourse.onmessage_enforce_same_origin_whit
Description	
Choices	
Type	string
Value	https://servicenow.openrainbow.io

3.4 Whitelisting RCB for cross-origin REST API access

Type “CORS Rules” in the left search box.



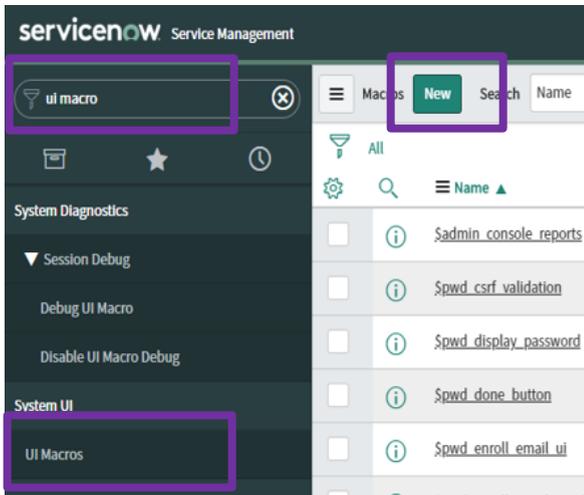
Click New button on the top, a new form will open. And configure field like that

Field	Value
Name	RCB
Domain	https://servicenow.openrainbow.io
REST API	Table API[now/table]
HTTP Methods	check all (GET, POST, PUT, PATCH and DELETE)

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.



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">
  <g:evaluate var="jvar_guid" expression="gs.generateGUID(this);" />
  <j:set var="jvar_n" value="show_incidents_{$jvar_guid}:{$ref}"/>
  <g:reference_decoration id="{$jvar_n}" field="{$ref}" onclick="dialContact('{$ref}');"
    title="Click to Dial" image="dial.jpgx" icon="icon-phone"/>

  <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
        };
      }

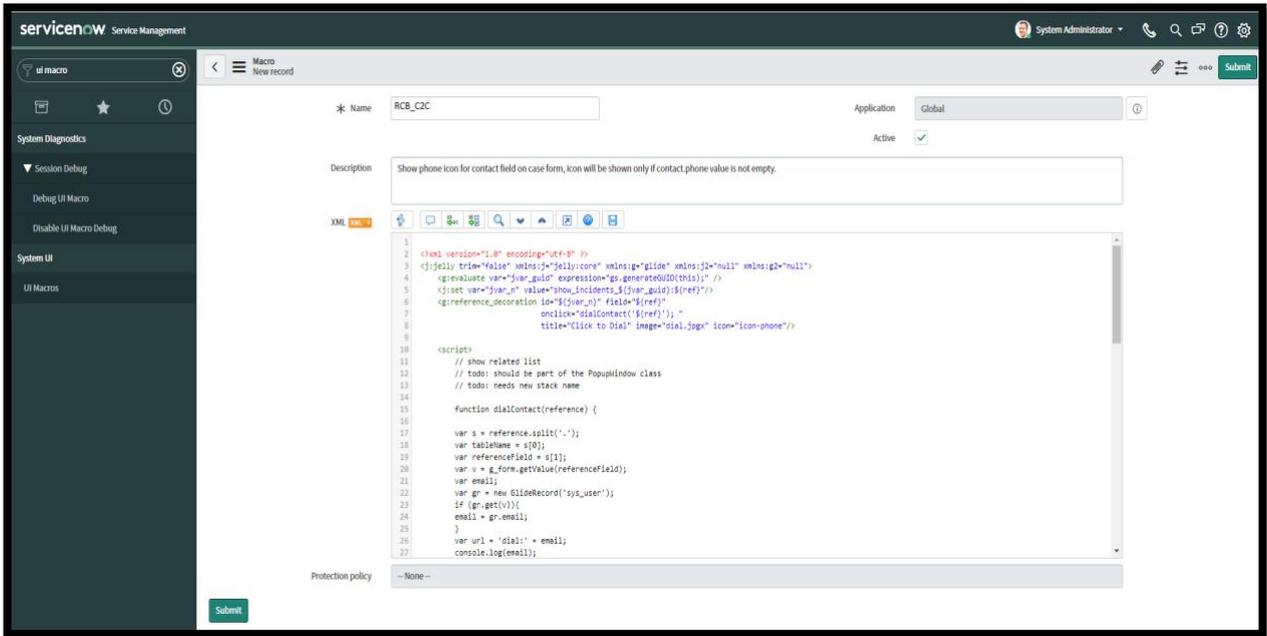
      var payload = { "type": "C2C", "data": contact };
      var context = { "payload": payload, "method": "openframe_communication" };
      CustomEvent.fireAll("openframe_request", context);

    }

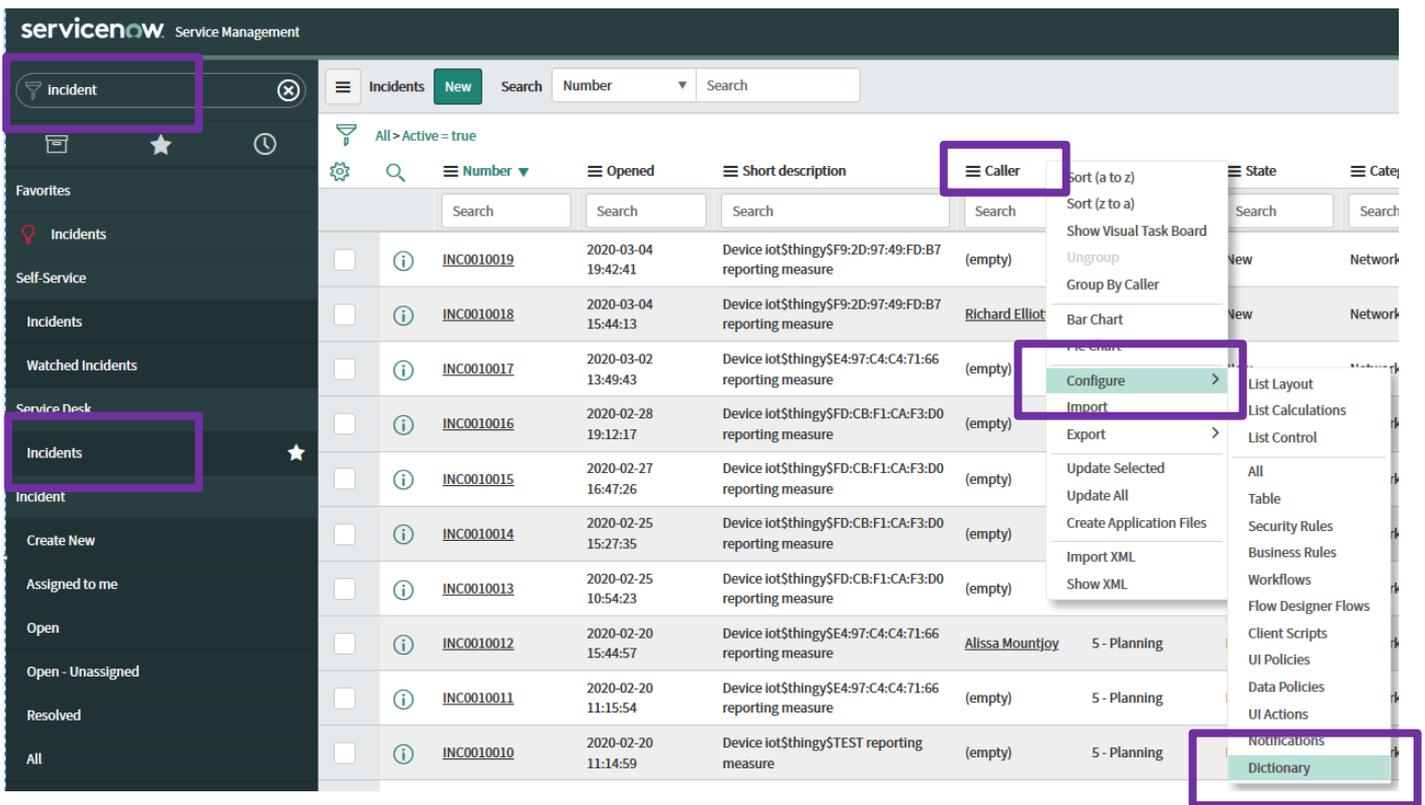
  </script>
</j:jelly>

```

Like that:



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



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

Click “incident” against the column name “caller_id”

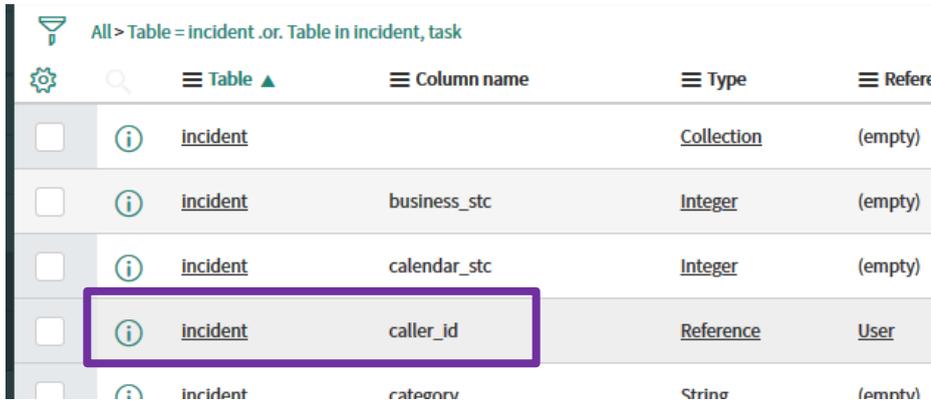


	Table	Column name	Type	Reference
<input type="checkbox"/>	incident		Collection	(empty)
<input type="checkbox"/>	incident	business_stc	Integer	(empty)
<input type="checkbox"/>	incident	calendar_stc	Integer	(empty)
<input type="checkbox"/>	incident	caller_id	Reference	User
<input type="checkbox"/>	incident	category	String	(empty)

and replace the text from attributes field with:

`encode_utf8=false,ref_contributions=RCB_C2C;user_show_incidents`

* Table

* Type

* Column label

* Column name

Alters the behavior of a field or functionality that depends on the field. [More Info](#)

Attributes

Reference Specification | Choice List Specification | Dependent Field | Calculated Value | Default Value

The Reference field specifies what table this field displays values from.

* Reference

Use reference qualifier

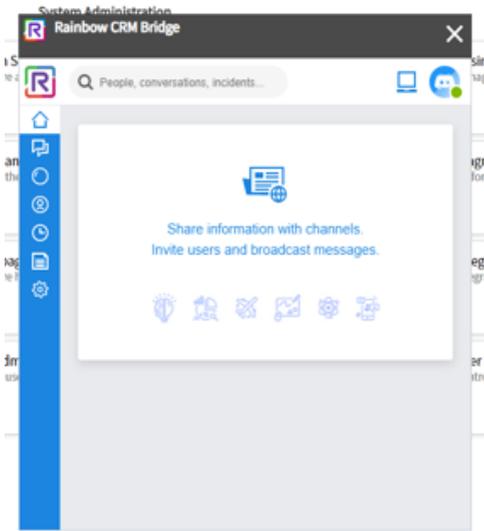
and then click Submit button.

RCB has now been configured for the ServiceNow instance.

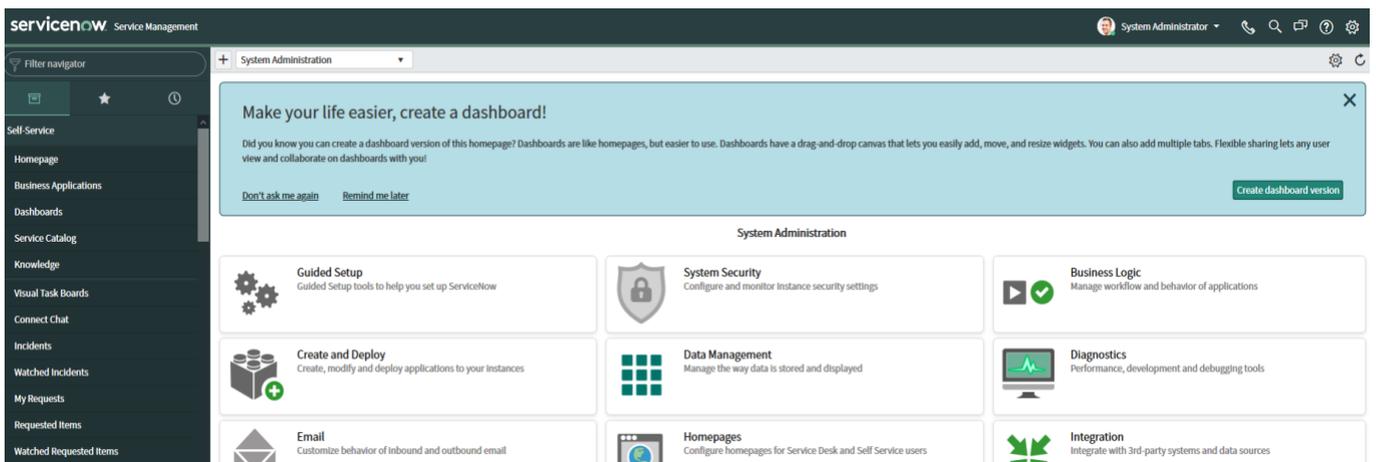
Please refresh your page to start using RCB application.

4 Application in Expanded and Collapsed mode

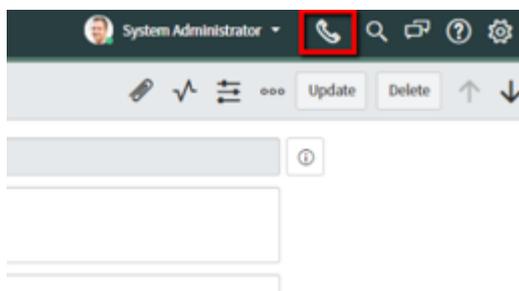
4.1 Rainbow CRM Bridge widget in maximized (visible) mode



4.2 Rainbow CRM Bridge widget in minimized(hidden) mode

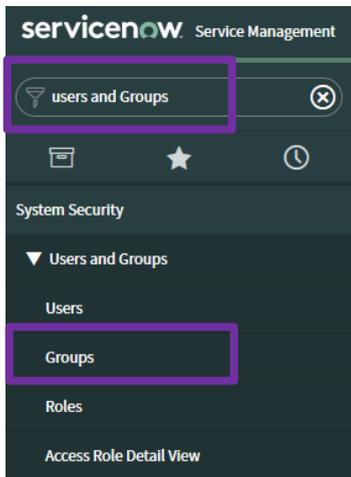


Note: To open minimized Rainbow CRM Bridge widget, click on telephone icon that is available on the top right.

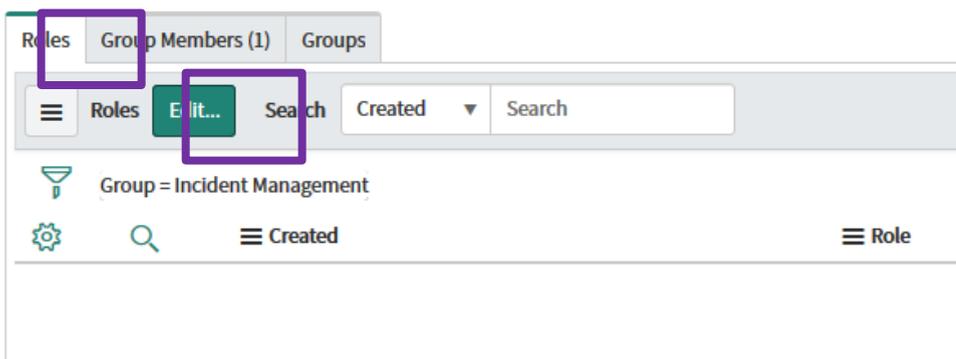


5 Rainbow CRM Bridge access authorization

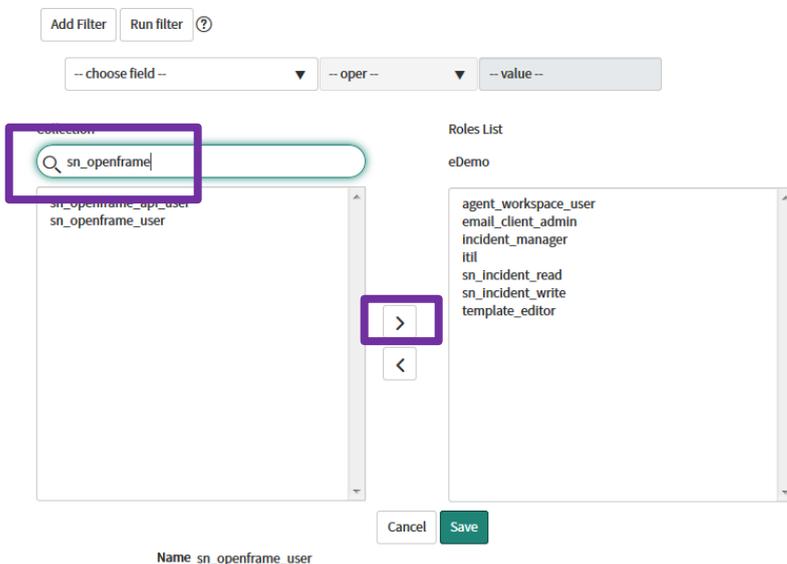
Type “users and Groups” in the left search box. Open “Groups” under “users and Groups”.



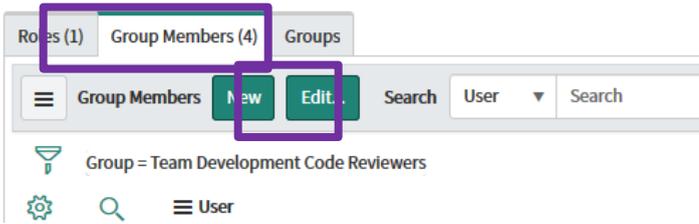
In the name search field type the Group name associate to your users like: “Incident.Manager” and hit Enter. Select “Roles” tab and click on Edit button to open the Group Roles selection windows



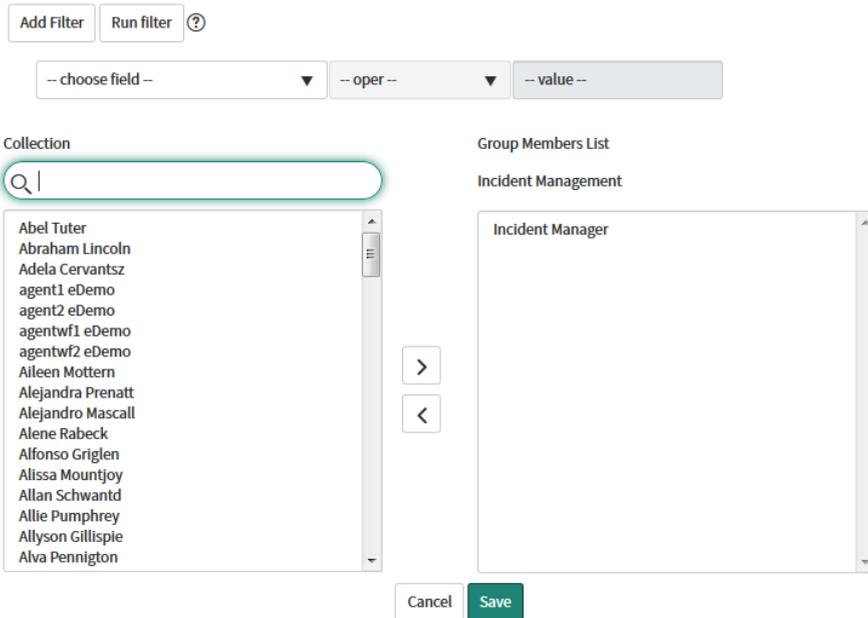
In the Collection search field type “sn_openframe” select “sn_openframe_user”. Push it on the Roles List and Save.



Select the Group Members tab



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.



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.

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