

Oracle® Service

Implementation Guide

Release 11*i*

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ORACLE®

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Oracle Service Implementation Guide, Release 11*i*

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Preface

Welcome to the **Oracle Service, Release 11i**.

This Implementation Guide provides information and instructions to help you work effectively with Oracle Service products.

This preface explains how this Implementation Guide is organized and introduces other sources of information that can help you.

Intended Audience

This guide is aimed at the following users:

- Technical Service Representatives (TSR)
- Customer Service Representatives (CSR)
- System Administrators (SA), Database Administrators (DBA), and others with similar responsibility.

This guide assumes you have the following pre-requisites:

1. Understanding of the company business processes.
2. Knowledge of products and services as defined by your marketing policies.
3. Basic understanding of Oracle and Developer/2000.

Structure

This manual contains the following chapters:

“Implementing Installed Base” provides step by step procedure for setting up Installed Base.

“Implementing Knowledge Management” contains step by step procedure for setting up Knowledge Management.

“Implementing Charges” presents step by step procedure for setting up Charges.

“Implementing Counters” contains step by step procedure for setting up Counters.

Related Documents

For more information, see the following manuals:

- Oracle Support Implementation Guide
- Oracle Support Concepts and Procedures Guide
- Oracle Customer Care Concepts and Procedures Guide
- Oracle Customer Care Implementation Guide
- Oracle Service Concepts and Procedures Guide

Implementing Installed Base

The Installed Base is one of the key components of the Service suite of products. It is a repository of product information from the time it is sold to a customer. The Installed Base contains detailed description of the products sold to one or more customers. Some of the key information maintained in the Installed Base is the contracts/warranties covering a product, counters associated with the product, the installed-at, bill-to & ship-to locations of the product, the configuration to which the product belongs.

In addition to sales order information, the Installed Base tracks installation details, product status, and history. These details include item numbers, serial and lot numbers, revision history, order numbers, order dates, current status, customer addresses, various contacts, prices, quantities, agreements, ship dates, and installation dates. As customers order new products and services, or upgrade existing ones, the Installed Base repository automatically adds new sales order information. It also allows product ownership to be transferred among customers in the Installed Base.

The Installed Base is a repository which contains vital information and details of a Service Provider's Customers, Products, and Services. All data contained in the Installed Base must be constantly updated by a Service Provider in order to ensure the accuracy of his customers and their products.

New Customer Model (TCA) Features

For 11i, Installed Base is leveraging the new customer model. A product in the Installed Base is owned by an account. However, even though a product is owned by only one account, it can still be associated with multiple parties with different "relationship types" such as "leasee", "user" for each association. The billing too is done at the account level.

Shared Customer Master

Installed Base shares customer master information with other modules such as Oracle Order Management, Oracle Receivables, and Oracle Sales. Sharing this critical information across various applications helps to ensure that it is consistent and accurate.

Customers can be defined in Oracle Order Management, Oracle Receivables, Oracle Customer Support. For each customer, multiple addresses can be defined and one or more business purposes can be specified for each address. These business purposes can be used to indicate bill-to, ship-to, and installation addresses. Contacts and telephone numbers can be assigned to either a specific address or a specific customer. For each product in the Installed Base, Oracle Customer Support tracks up to three addresses (bill-to, ship-to, and installation), and any number of contacts.

Shared Item Master

Oracle Customer Support shares item master information with other modules such as Oracle Inventory, Oracle Order Management, Oracle Bills of Material, Oracle Work in Process, Oracle Purchasing, Oracle Master Scheduling/MRP and Supply Chain Planning, and Oracle Quality.

In Oracle Inventory, items that represent products or services that are critical to your service organization can be defined, such as:

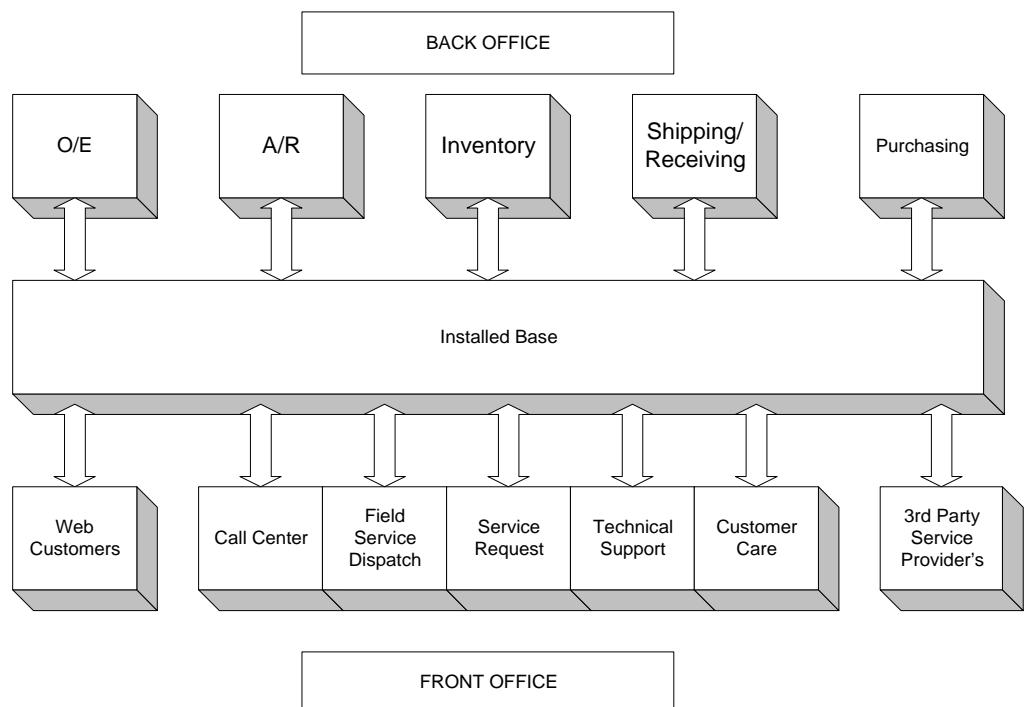
- Serviceable products, which are end items that you wish to track in the Installed Base after they are sold.
- Service programs, which represent billable support services such as telephone support, field service support, extended product warranties, etc.
- Warranties, which can be attached to a specific serviceable product, are applied automatically when you sell those products.
- Material, such as replacement parts, used as defective products are repaired in a Depot Repair facility.
- Labor and expenses used in Depot Repair, Field Service, or Customer Support.

Oracle Inventory uses item attribute groups to determine how to treat items in the various Oracle Applications modules that share the item master. Accordingly, the Service attribute group is used by Oracle Inventory etc. to flag a particular item as a serviceable product, service program, warranty, material, labor, or expense.

Warranties can be specified by adding the warranty item to the bill of material for the product that the warranty covers.

For example, assume you sell personal computers. “Pentium Super” is an end product, defined as a serviceable product for Installed Base tracking. “90-day warranty,” another item, is a warranty that always comes with the Pentium Super. “Hotline support” and “Extended coverage,” two additional items, are billable service programs that you optionally sell along with the Pentium Super, or perhaps sell later when the included warranty expires. “Power supply A” is a material that you sometimes replace in the Pentium Super. “Standard labor rate,” an item with a list price of \$50 and a unit of measure of hours, is billable labor to repair the Pentium Super. “Zone 1 travel expense” is a billable expense for when you have to dispatch an engineer to repair a Pentium Super at a customer site. Each of these is defined in the Oracle Inventory item master, and “90-day warranty” is part of the bill of material for “Pentium Super”.

Installed Base Integration Points



Products

A product is an instance of a particular product you have sold to an end customer or distributor. The product reference number uniquely identifies any product (serialized or non-serialized) in the Installed Base. A product is further distinguished by a quantity, serial number (if the serviceable product it represents is under serial control in Oracle Inventory and has been assigned a serial number at the time of shipment), its location code (bill-to, ship-to, and installation location), contacts, order information, and revision history.

Create Product

Navigation: **Customer Support Responsibility > Installed Base > Create Customer Product**

The Create Product screen is an HTML user interface and it allows the user to add products from the item master to installed base for the customer.

Navigate to the My Products tab. The user is presented with the Installed Base summary information screen.

Information regarding the products, product part number, serial number, product status is available. Installed base also provides a “Customer View” and “Merchant View” for products.

The Customer View may be defined as the ability for the customer to view and maintain all purchased products and configurations in the Installed Base.

The Merchant maintains a similar view of the customer’s Installed Base. Each party can update a checkbox to agree whether the current details for a product is correct.

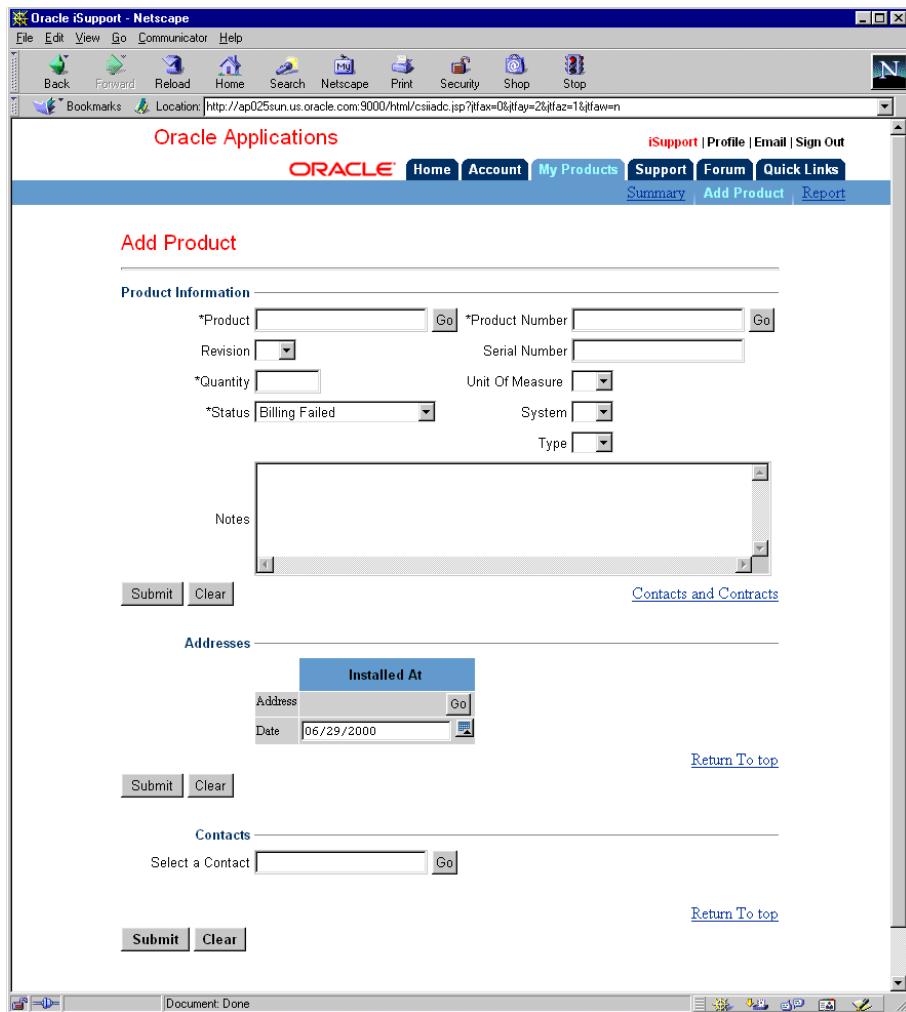
	Product Description	Part Number	Serial Number	Status	Customer View	Merchant View
AITG Discrete Test item	11143			Installed	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Envoy Lite	147			Installed	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Envoy Lite	147			Latest	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Build Your Own Desktop	137			Latest	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Envoy Ambassador	141	232323		Latest	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Build Your Own Desktop	137	12345		Billing Failed	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Envoy Lite	147			Latest	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Envoy Standard	151			Latest	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The user can add products

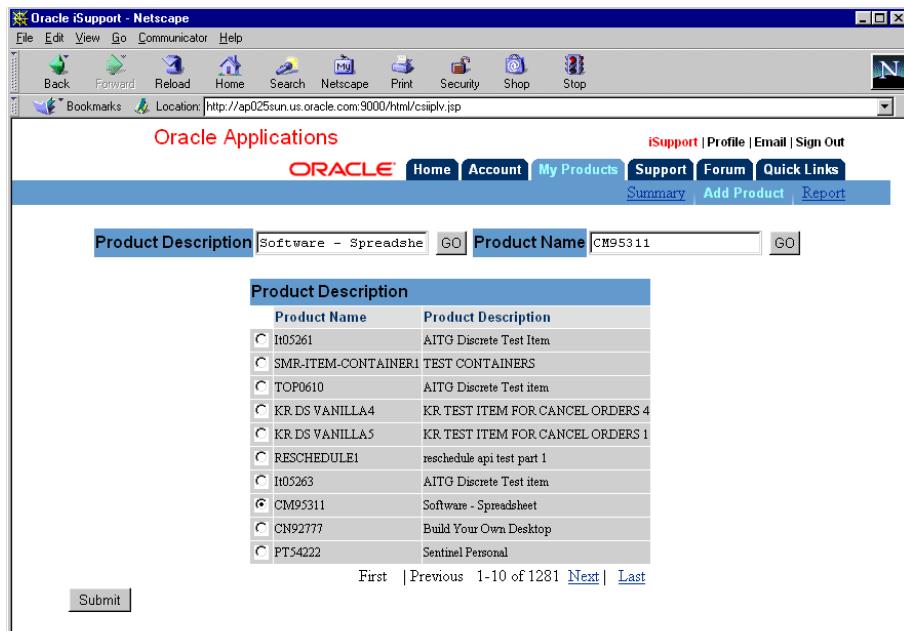
- at root level
- as a child belonging under an existing product

To add a product at root level, select the “Add new product” sub tab. The Add Product screen is displayed where the user can do the following:

- Enter the relevant information on the screen depending on the details of the product they wish to add.
- The required fields are displayed with an asterisk (*) besides it.
- Click Submit.

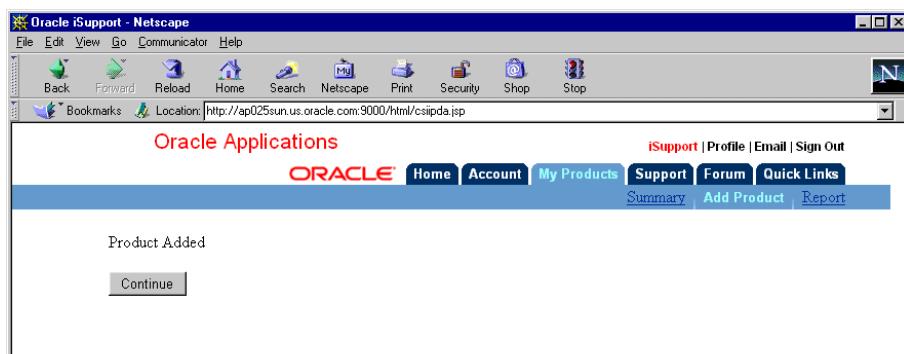


Click on the “GO” Button next to the appropriate field to access the selection screen. For example clicking on the Go button next to the “Product” field pops up the following selection screen:



Click on Submit when the required information has been completed on the Add Product screen.

A confirmation is displayed when the product is added successfully.



It is also possible to add a product under an existing product (therefore creating a hierarchy of products). This is done from the Product Summary screen if you click

on the product for which you wish to add a “child” product, the Product Details screen is displayed where the option to add a new product is available. It is possible to add a product at any level and similarly, any number of products can be entered at a given level.

The screenshot shows the Oracle Applications Product Details screen. The browser title is "Oracle iSupport - Netscape". The URL in the address bar is <http://ap025sun.us.oracle.com:9000/html/csipdt.jsp?productId=4812>. The page header includes the Oracle logo and links for Home, Account, My Products, Support, Forum, Quick Links, Summary, Add Product, and Report. The main content area is titled "Product Details". It contains sections for "Product Information" and "Order Information". The "Product Information" section includes fields for Product (Software - Spreadsheet), Product Number (CM95311), Revision, Serial, Quantity (1), Reference (5792), Status (Billing Failed), System (eCommerce CRM Solution), Type (Software), UOM (Each), Configuration Type (As Maintained), and checkboxes for Propagate Changes and Notes. Below this is a "Select an Action" dropdown menu with options Add, Contacts and Contracts, and Delete, currently set to Add. The "Order Information" section includes fields for Order Number, Order Date, Order Line, Lot Number, and Amount. The "Addresses" section contains a table with columns for Installed At, Shipped To, and Billed To. The table has rows for Address, City, State and Zip, and Country. The "Address" row has a "Go" button. The "Date" row shows 06/29/2000 and 08/30/2001. At the bottom are "Submit" and "Clear" buttons, and a link to "Return To top". The status bar at the bottom of the browser window shows "Connect: Host ap025sun.us.oracle.com:9000 contacted. Waiting for reply...".

Delete Product

Select the desired product from the Product Summary screen which you want to delete.

The user may have to drill down the tree structure to view the detail information and then select the appropriate product.

Select Delete Product from the LOV from the Select Action field.

Click Submit.

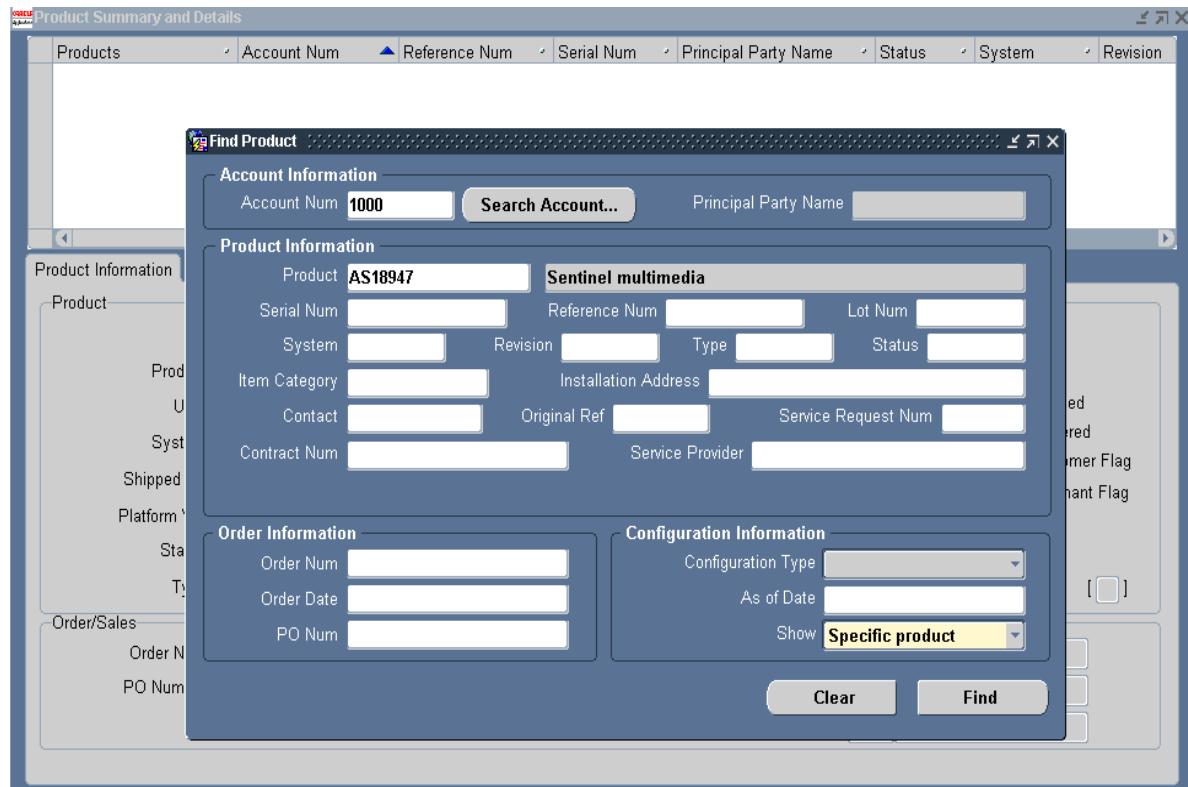
The product should get deleted from the installed base for the customer.

This process is similar to adding a product.

View Product

Oracle Customer Support offers powerful search criteria for finding all products for a particular customer, or a specific product serial number. You can apply various combinations of product attributes in your search, such as location, status, contact, and order number.

1. Navigation: **Customer Support responsibility**> **Installed Base** -> **View Customer Product**.
2. Alternatively the user can view the product from the Contact Center by clicking on the Installed Base button. In that case the Find window will not appear since the Account information is being passed to the Installed Base form and it will directly bring up the Products Summary form.
3. The Find products window appears:
4. The user can search by account information, product information, order information and configuration information. The search would be refined on the basis on the number of fields populated.
5. The user can also search for account information by clicking on the Search Account button.
6. Click on Find.
7. The Product Summary form will be displayed with the relevant information.



The screenshot shows a software interface for managing products. At the top, there is a toolbar with various buttons and a menu bar. Below the toolbar, a main window titled 'Product Summary and Details' is displayed. This window contains a list of products on the left and a detailed view on the right. A 'Find Product' dialog box is open in the center. The dialog box has several tabs: 'Account Information', 'Product Information', 'Order Information', and 'Configuration Information'. The 'Product Information' tab is currently selected. It contains fields for Product (set to 'AS18947' and 'Sentinel multimedia'), Serial Num, Reference Num, Lot Num, System, Revision, Type, Status, Item Category, Installation Address, Contact, Original Ref, Service Request Num, Contract Num, Service Provider, Order Num, Order Date, PO Num, Configuration Type, As of Date, and Show (set to 'Specific product'). At the bottom of the dialog box are 'Clear' and 'Find' buttons, with 'Find' being highlighted in yellow.

The Installed Base Product Summary form has the following tabs:

1. Product Information tab
2. Configuration tab
3. Addresses tab
4. Contracts tab
5. Resources tab
6. Counters tab

Product Summary and Details

Products	Account Num	Reference Num	Serial Num	Principal Party Name	Status	System	Revision
AS18947	1000	1021		Business World	Latest		
AS18947	1000	1022		Business World	Latest		
AS18947	1000	1024		Business World	Latest		
AS92689	1000	1026		Business World	Latest		

Product Information Configuration Addresses Contracts Resources Counters

Product

Product	AS18947	Sentinel multimedia	<input type="checkbox"/> Split
Uom	Ea	Qty 4	<input type="checkbox"/> Shipped
System		Ref Num 1021	<input type="checkbox"/> Delivered
Shipped On		Revision	<input type="checkbox"/> Customer Flag
Platform Ver		Lot Number	<input type="checkbox"/> Merchant Flag
Status		Return By	
Type		Effective From	
		Effective To	
		Product Agreement	<input type="checkbox"/>

Order/Sales

Order Num	24648	Order Date	04/18/1997	Line Number	1
PO Number		Invoice Num		Invoice Date	
				Amount	1969

The Product Information Tab

The Product Information tab gives detailed information about the product as well as the order and sales information. It provides a Service Provider with a detailed description of each Product. It contains a list of Product attributes that must be tracked and updated for each of his Customers Products.

- Product (Name and Description): display only field
- Unit of Measure: display only field
- Reference Number: display only field

- Shipped On (date): display only field
- Order Number: display only field
- PO Number: display only field
- Order Date: display only field
- Line Number: display only field
- Invoice Number: display only field
- Invoice Date: display only field
- Amount: display only field

All other fields can be updated by the user.

The Configuration Tab

The Configuration tab provides a truncated graphical tree view or Item Master List of a Customer's Products that reside in the Installed Base. Starting from the Parent Assembly down through each Child component, it permits a user to click on a branch to display the attributes of any component that may be linked to that branch.

The Configuration Tab displays the configuration of the product which includes the following:

- Configuration Type: The user can pick from the LOV (As Maintained or As ordered)
- Parent Assembly includes the following information:
 - Product: display only field
 - Reference
 - Serial Number: display only field
 - Lot Number: display only field
- Top Assembly includes the following information:
 - Product: display only field
 - Reference: display only field
 - Serial Number: display only field
 - Lot Number: display only field

- Click on the Product Tree button to view the configuration tree for the selected product. The configurative is displayed in an HTML UI.

Installed Base allows the creation of a product's configuration which can be displayed as a tree graphic or item master list showing all its parent and child assemblies, and ability to "drill-down" on any branch to view the detailed information.

Installed Base allows the user the ability to track, update, and maintain a Customer's latest product configuration in the Installed Base by updating the parent and child assemblies whenever a new part or component is installed or replaced and must include all serial numbers and revisions that move in and out of a product during its entire active lifetime.

Product Summary and Details

Products	Account Num	Reference Num	Serial Num	Principal Party Name	Status	System	Revision
AS18947	1000	1021		Business World	(Latest *** ...)		
AS18947	1000	1022		Business World	(Latest *** ...)		
AS18947	1000	1024		Business World	(Latest *** ...)		
AS18947	1000	1027	SM100000	Business World	(Latest *** ...)		
AS18947	1000	1035	SM100004	Business World	(Latest *** ...)	Small Workst...	
AS18947	1000	1038	SM100008	Business World	(Latest *** ...)		

Product Information Configuration Addresses Contracts Resources Counters

Configuration Enabled

Configuration Type **AS_MAINTAINED**

Parent Assembly

Product		Effective	
Reference	Serial Number	Lot Num	

Top Assembly

Product		Lot Num
Reference	Serial Number	

Product Tree

The Address Tab

The Addresses Tab allows the user to view the different addresses for the product and it includes:

- Installed At Address: can be populated from the LOV for the field. The Installed At Address contains the location where a Customer's Product or equipment is installed and being maintained by a Service Provider.
- Bill To Address: display only. The Bill To address is the location where a Service Provider is requested to call for service authorizations, and to send his invoices for billing and payment.
- Ship To Address: display only. The Ship To address is the location where a Service Provider is requested to send out equipment, parts, and supplies for a Customer's installed and maintained Products. This address may sometimes be identical to the Installed At Address.

Product Summary and Details

Products	Account Num	Reference Num	Serial Num	Principal Party Name	Status	System	Revision
AS18947	1000	1021		Business World	{Latest *** ...}		
AS18947	1000	1022		Business World	{Latest *** ...}		
AS18947	1000	1024		Business World	{Latest *** ...}		
AS18947	1000	1027	SM100000	Business World	{Latest *** ...}		
AS18947	1000	1035	SM100004	Business World	{Latest *** ...}	Small Workst...	
AS18947	1000	1038	SM100008	Business World	{Latest *** ...}		

Product Information Configuration Addresses Contracts Resources Counters

Installed At Shipped To Billed To

Party			Account Number
Address	Lahnstrasse 3	PO Box 8790543	PO Box 680978
		ATTN: Accounts Receivable	ATTN: Accounts Receivable
		Vision Corporation	Vision Corporation
City	Heppenheim	San Mateo	FRANKLIN D ROOSEVELT
State/ZIP	D-64646	CA	NY
Country	DE	94002	10022
		US	US

The Contracts Tab

You can view comprehensive support service information about your products, while you monitor both current and historical data. You can also view transactions, transaction details, and product service details. For example, you can view product services to determine how many products have a particular type of service, or you might want to know what type of service program can be applied to a product. Viewing product services enables you to determine which service programs are about to expire, and then initiate the steps to renew them.

The Contracts Tab allows the user to view the contracts information associated with the product. This includes the following:

- Contract Number
- Service
 - Name
 - Description
- Coverage
 - Name
 - Description
- The Warranty flag gets enabled if the contract is a warranty.
- Start and End Dates.

The Resources Tab

The Resources Tab displays information about the Resources which are associated with the product: The user has the ability to associate resources to the product on this tab.

Steps:

- Pick a Name from the LOV
- Resource information will be displayed on the tab including:
 - Resource Number

- Email Address
- Fax
- Home Phone
- Address
- Preferred and Primary check box if need be.

Product Summary and Details

Products	Account Num	Reference Num	Serial Num	Principal Party Name	Status	System	Revision
AS18947	1000	1021		Business World	(Latest ***...)		
AS18947	1000	1022		Business World	(Latest ***...)		
AS18947	1000	1024		Business World	(Latest ***...)		
AS18947	1000	1027	SM100000	Business World	(Latest ***...)		
AS18947	1000	1035	SM100004	Business World	(Latest ***...)	Small Workst...	
AS18947	1000	1038	SM100008	Business World	(Latest ***...)		

Product Information Configuration Addresses Contracts Resources Counters

Service Provider

Name	Type	Work	Pager	Cell	Address	Preferred	Primary
Walker, Mr. Tony	<input type="checkbox"/>				78 Bourne End Road , Pang	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>

Resource Num Email Address

Fax Home Phone

The Counters Tab

The Counters Tab displays the counter information, if any, which is related to the product. It includes the following information:

- Product

- Counter
- Type
- Unit of Measure
- Reading
- Capture Date
- Product Description
- Counter Description
- Serial Number
- Lot Number
- Reference Number
- Parent Product

The user can setup counters for the product from the Setup screen for counters which can be accessed in two ways:

- Navigate to the Tools menu of the screen and choose the Setup Counters option.
- Alternatively, the user can access it with this path: Customer Support Responsibility > Setup > Counters

The user can also capture counter readings by clicking on the Capture Readings button and accessing the Capture Readings screen.

Note: See the Counters Installation guide for the details.

Product Summary and Details

Products	Account Num	Reference Num	Serial Num	Principal Party Name	Status	System	Revision
AS18947	1000	1021		Business World	{Latest ***...}		
AS18947	1000	1022		Business World	{Latest ***...}		
AS18947	1000	1024		Business World	{Latest ***...}		
AS18947	1000	1027	SM100000	Business World	{Latest ***...}		
AS18947	1000	1035	SM100004	Business World	{Latest ***...}	Small Workst...	
AS18947	1000	1038	SM100008	Business World	{Latest ***...}		

Product Information Configuration Addresses Contracts Resources Counters

Product	Counter	Type	UOM	Reading	Formula Complete	Capture date	Reset
					<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Product Description
Counter Description
Serial Num Lot Num Reference Num
Parent Product

The Tools Menu

The Tools menu gives access to a host of additional functionality from the Product Summary window. These include the following options:

1. Revisions
2. Split Products
3. System Details
4. Audit

- 5. Counters Setup
- 6. Events
- 7. Languages
- 8. Notes
- 9. Service Requests
- 10. Repair History

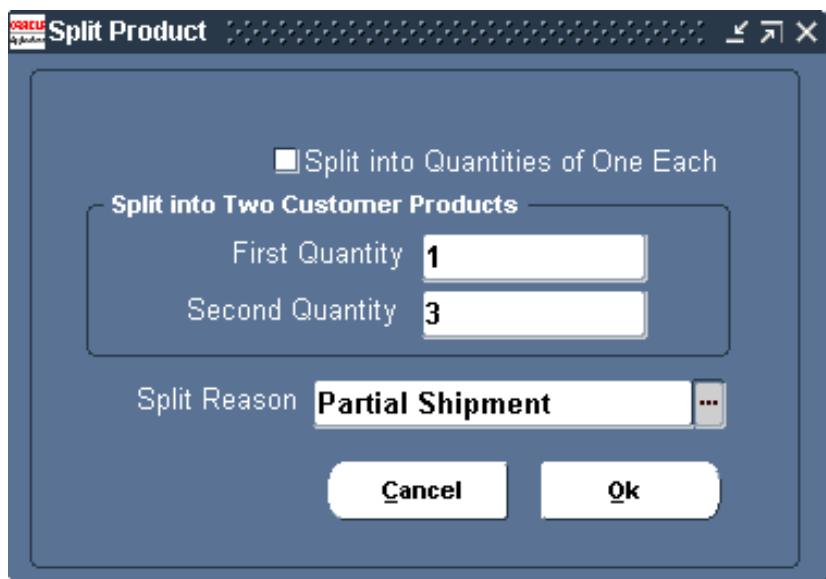
Revisions

The user can view product revisions in the Installed Base for any product. Each product will have one or more revisions associated with it. When a product is created in the Installed Base, a revision is automatically created for it. If a new revision of the product is ordered using Oracle Order Management, a new revision for that product is automatically created. At any given time, only one of the revisions is considered the current revision of any product. The user can choose which revision to make active in the Products Summary window.

Split Products

Each product record contains the quantity sold. For serviceable products under serial control, Installed Base will automatically split the product into quantities of one. Each new product created from the split carries the same attributes of the original product, but has a quantity of one and a unique serial number. Products can also be split manually. Reasons for splitting product quantities could be:

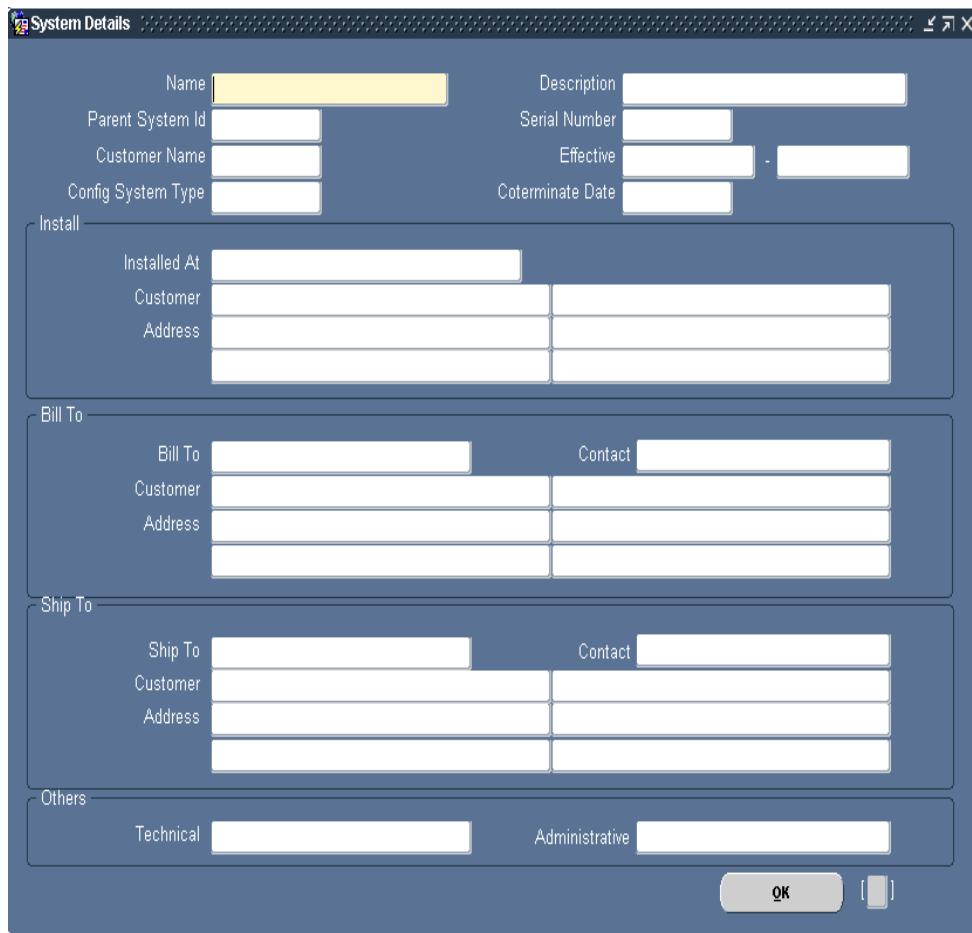
- Isolating a quantity for transfer to an end customer
- Setting apart a quantity to terminate
- Setting aside a quantity to install elsewhere.
- Setting apart a quantity to apply (order) a new service program
- Setting apart a quantity to upgrade or repair



System Details

Products can be arranged into groups called systems for service management or distribution of responsibility. An example of a system is a grouping of products such as printers, work stations, and servers supported by a service program that maintains computer hardware.

One reason to group products in this way might be for co-termination of service program end dates for all products in the group. Another reason might be that the system represents a place (a floor of a building, an airplane tail number, etc.) where all the products in the group are located.



Audit

The audit history of products is entirely viewable, from the initial customer order, through transfers, splits, additions to systems, cancellations, and terminations. A comprehensive audit trail of changes is maintained, including who made the change and when.

1. Select the record to view on the Products summary screen and then choose **Audit** from the Tools menu.
2. Optionally, navigate to the following alternative regions:
 - Customer, System
 - Agreement
 - Type, Status
 - Split Product

Audit History

Customer , Systems

Customer **System**

Update Date	Updated By	Old	New	Old	New
21-JUL-1997	MFG	American Telephone	Business World		
21-JUL-1997	MFG	American Telephone	Business World		
21-JUL-1997	MFG				
15-AUG-1997	MFG	Hilman and Associa	Business World		Small Workstation1
15-AUG-1997	MFG	Hilman and Associa	Business World		Small Workstation1
15-AUG-1997	MFG	Imaging Innovation	Business World		Small Workstation1
15-AUG-1997	MFG	Imaging Innovation	Business World		
15-AUG-1997	MFG	Imaging Innovation	Business World		
15-AUG-1997	MFG	Imaging Innovation	Business World		
15-AUG-1997	MFG	Total Internet	Business World		
15-AUG-1997	MFG	Total Internet	Business World		Small Workstation1
25-JAN-1998	OPERATIONS				

OK

Counters Setup

This option allows the user to setup counters associated to the selected product. The user can setup physical or logical counters.

Please refer to the Counters section of the Customer Support documentation for further details.

Events

This option allows the user to view the conditions form in the Events module. The user can create events which could trigger off a notification or task to be created based on certain conditions defined for the product.

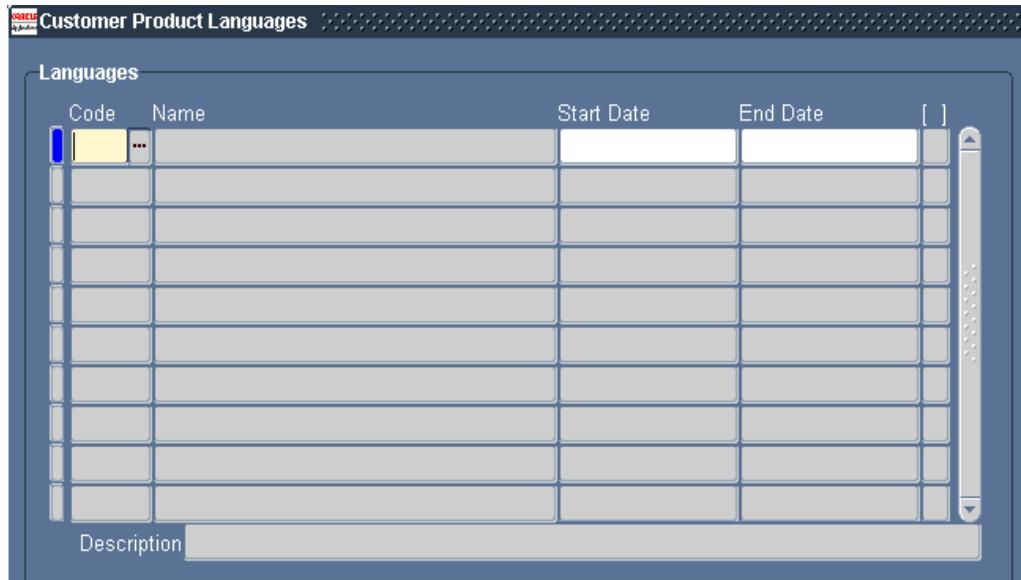
The conditions could be based on any of the three things:

- Expression
- Function
- Counter

Please refer to the [Events documentation](#) for more details.

Languages

Multiple languages can be defined in the following screen:



Notes

This option brings up the foundation Notes module. The user can create notes related to the product, customer or general notes. It allows the user to view previous notes.

Please refer to the Notes section in the Customer Support documentation for more details.

Service Request

This option brings up the Service requests related to the selected customer product. The user can select any to view the details of a particular service request.

Please refer to the Service Request section in the Customer Support documentation.

Repair History

This option allows the user to view the repair history for the product from Depot Repair.

Please refer to the Depot Repair documentation for more details.

Maintain Systems

Navigation Path: Customer Support Responsibility > Installed Base > Maintain Systems

The user can access the maintain systems screen in addition to the systems screen from the Tools menu of the Product Summary screen.

Create system details as follows:

- Enter a system description.
- Choose a Customer and specify a type for the system.
- Optionally, you can enter a Parent System, System Number, Type, Effective From and To, Co-terminate Day and Month, Installed at location, Customer, Address, Bill To and Ship To Customers, Addresses, and Technical and Administration Contacts. A system type refers to the description of the system as a whole. Examples of systems would be: hardware, software, CPU, or communication. These types of systems represent logical groupings of products. A System Number can be any number you specify, such as a serial number.
- Enter System Details

- Enter Installation Details
- Enter Billing Details
- Enter Shipping Details
- Enter Contact Details
- View Products
- Optionally, choose Copy Systems to create one or multiple new systems based on the current configuration.
- Save your work.

Systems (Vision Operations)

System	Small Workstation1	Description	Small Workstations
Customer	Business World	Number	1000
Parent System		System Num	
Effective From	09-AUG-1997	Coterminate Day-Month	<input type="checkbox"/>
Installation Details		Billing Details	
Installed At		Bill To	
Customer		Customer	
Address		Address	
		Contact	
Shipping Details		Contact Details	
Ship To		Technical	
Customer		Administration	
Address			
Contact			
		<input type="checkbox"/>	
		View Products	Copy Systems

Transfer Products

If you sell to distributors or dealers, you can transfer products from the distributor to an end customer as end customers identify themselves to your support organization. When you transfer products, any warranties and service programs attached to transferred products will be passed along to the end customer.

Navigation Path: Customer Support Responsibility > Installed Base > Transfer Products

The following screen is displayed once the user invokes the Transfer Products screen. The user can transfer the product from this screen.

Product Summary and Details

Products	Account Num	Reference Num	Serial Num	Principal Party Name	Status	System	Revision
AS18947	1000	1021		Business World	{Latest ***...}		
AS18947	1000	1022		Business World	{Latest ***...}		
AS18947	1000	1024		Business World	{Latest ***...}		
AS18947	1000	1027	SM100000	Business World	{Latest ***...}		
AS18947	1000	1035	SM100004	Business World	{Latest ***...}	Small Workst...	
AS18947	1000	1038	SM100008	Business World	{Latest ***...}		

Product Information Configuration Transfer Information Contracts Resources Counters

Transfer

Customer	System	Comments
----------	--------	----------

Installed At Shipped To Billed To

Party		Account Number
Address	PO Box 8790543	PO Box 680978
	ATTN: Accounts Receivable	ATTN: Accounts Receivable
	Vision Corporation	Vision Corporation
City	San Mateo	FRANKLIN D ROOSEVELT
State/ZIP	CA	NY
Country	US	10022

Setup Installed Base

A high level overview of Installed Base setup is as follows:

1. Set up Order Management. Refer to Order Management installation guide for details.
2. Set up the Configuration types.
3. Set up System Types
4. Set up Product Types
5. Set up Revision
6. Set up Statuses
7. Set up Installed Addresses. Please refer to Oracle Inventory setup for details.
8. Set up Contact Types

This is a lookup type and must be defined. You cannot create a contact for a product without specifying a contact type, for example “Technical”, “Administrator”etc. The lookup type “CS_CONTACT_TYPE” is seeded, however the user needs to seed the values also. Only then can contacts be associated with customer products.

9. Set up the Unit of Measure. Please refer to Oracle Inventory setup for details.
10. Make sure that the products which you want to include in the Installed Base are serviceable. This is done when you define products in inventory.

Setup Product Status

Product Status can be used to indicate the current state and translatability of a product. For example, products generated by new customer orders may be assigned a product status of Latest. Defective products that are returned and replaced can be assigned a status of Replaced in the Oracle Service Depot Repair module. When you cancel order lines in Oracle Order Management, the related products in the Installed Base are automatically assigned a status of Cancelled. When you sell a new product upgrade in Order Management, the product to be upgraded may be assigned a status of Upgraded. You can assign a status of Terminated for products that are no longer active or supported.

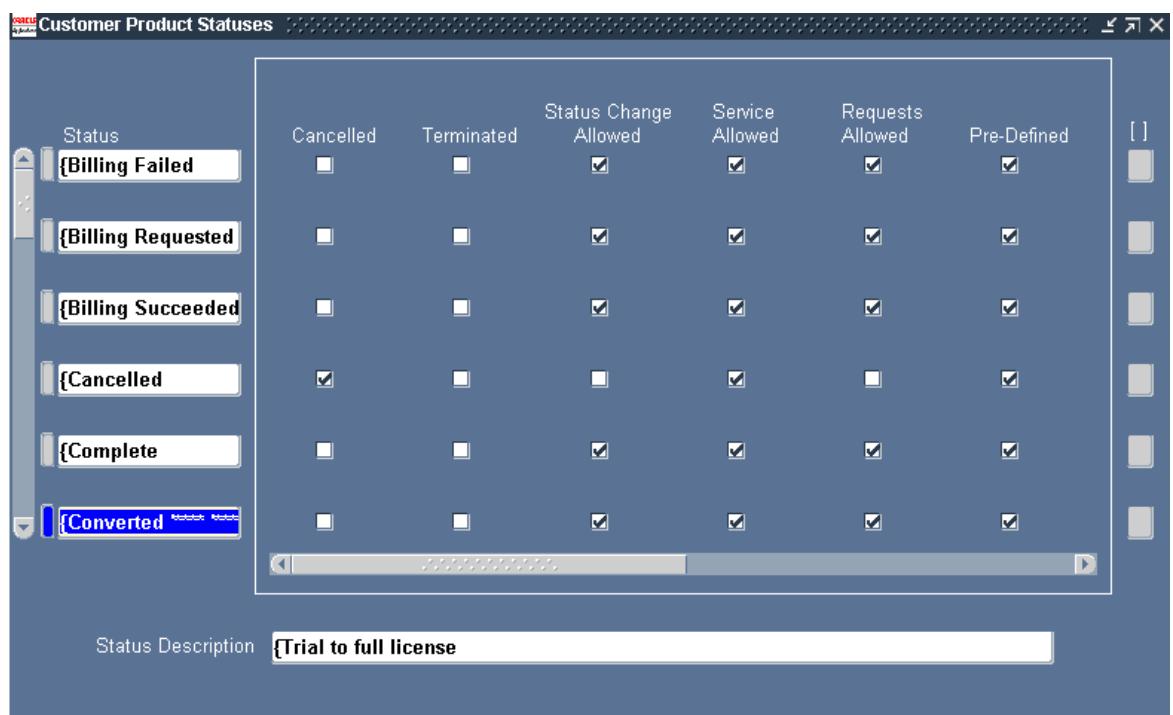
In addition to these predefined statuses, you can define your own. Each of these statuses has attributes that define the manner in which they affect the product. When a product is updated to have a Canceled status, the effective end date is also updated to the order date or the current date, whichever is earlier. When the

product is updated to a Terminated status, the effective end date is updated to the current date.

In order to create a product Status, carry out the following steps:

Navigation Path: Customer Support Responsibility > Setup > Installed Base > Product Status

The user can create a new product status from this screen. There are some seeded values such as Cancelled, Complete, Billing Requested.



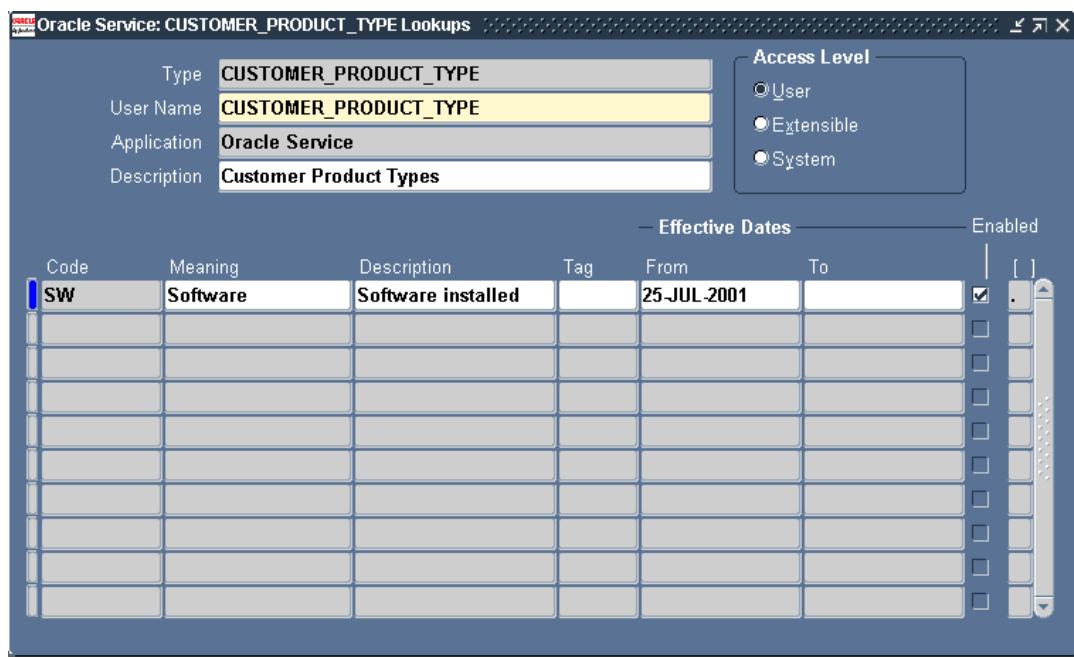
Setup Product Types

Products can optionally be categorized with user-defined product types. For example, you can create and assign product types such as Hardware, Software, Under Contract, etc.

Note that product types are informational only.

Navigation Path: Customer Support Responsibility > Setup > Installed Base > Product Types.

The user can define product types on the following screen:



Setup System Types

Navigation Path: Customer Support Responsibility > Setup > Installed Base > System Types

The user can define system types on this screen which can later be used in defining systems. To create a new system type, carry out the following steps:

- Click on the Add icon on the toolbar.
- Enter a code (mandatory field)
- Enter a meaning for the code (mandatory)
- Enter a meaningful description.
- Enter effectivity dates

- Optionally enter a Tag.
- The enabled check box is checked by default when the new row is added
- Click on Save.

Setup Transaction Billing Types

Navigation Path: Customer Support Responsibility > Setup > Installed Base > Transaction Billing Types.

The user can define Transaction billing types on the following screen. The user has to enter the appropriate information for the following:

- Transaction Type
- Billing Type
- Click on Save.

Transaction Billing Types

Transaction Types		Installed CP		New CP		Depot Qty Update Flag	No Charge Flag
Transaction Type	Seeded Flag	Installed Base	Status	Return Required	Status	Return Required	Depot Qty Update Flag
Advanced Replacement	<input type="checkbox"/>	<input type="checkbox"/>	{Returned}	<input checked="" type="checkbox"/>	{Loaned}	<input type="checkbox"/>	<input type="checkbox"/>
Autocreate Systems	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Conversion	<input type="checkbox"/>	New Customer ...	{Converted}	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Expense Transaction	<input checked="" type="checkbox"/>	No Updates		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Labor Transaction	<input checked="" type="checkbox"/>	No Updates		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Lease	<input type="checkbox"/>	New Customer ...	{Leased}	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

Description:

Effective Dates: - []

Billing Types

Name	Description	[]
Expense	Billable flag for Service Expense Billable	[]
Labor	Billable flag for Service Labor Billable	[]
Material	Billable flag for Service Material Billable	[]

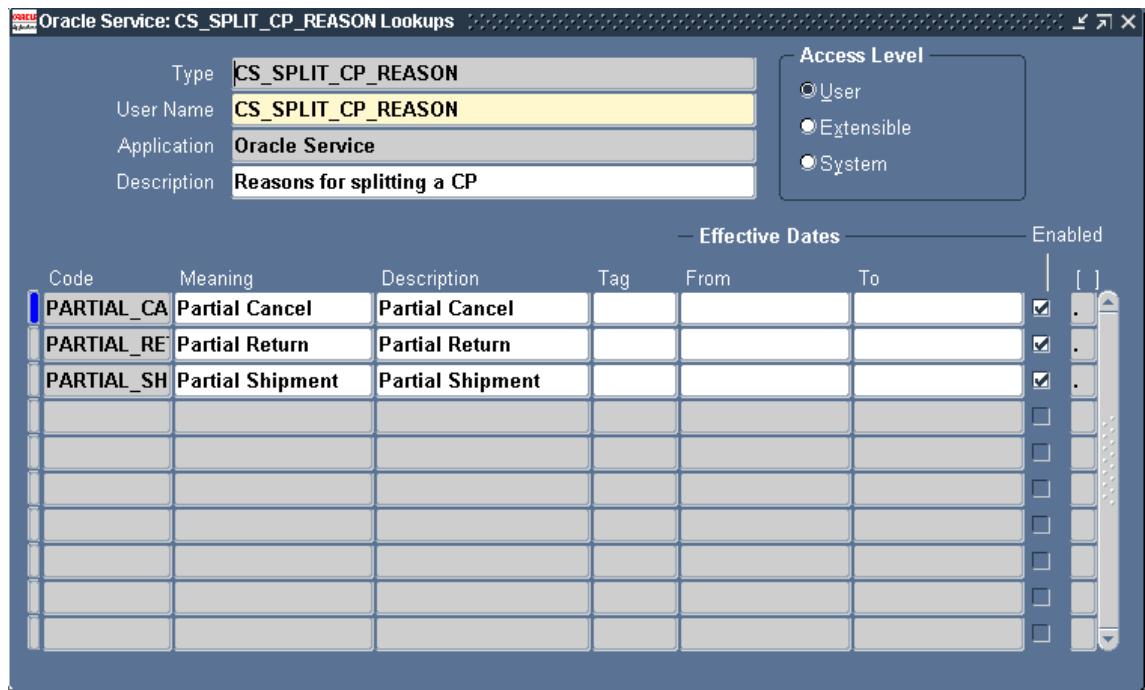
Setup Split Product Reasons

Navigation Path: Customer Support Responsibility > Setup > Installed Base > Split Reasons

The split reasons are used in the Split Product screen. The user can create additional split reasons on the following screens using these steps:

- Click on the Add icon on the toolbar.
- Enter a code (mandatory field)
- Enter a meaning for the code (mandatory)
- Enter a meaningful description.
- Enter effectivity dates
- Optionally enter a Tag.
- The enabled check box is checked by default when the new row is added

- Click on Save.

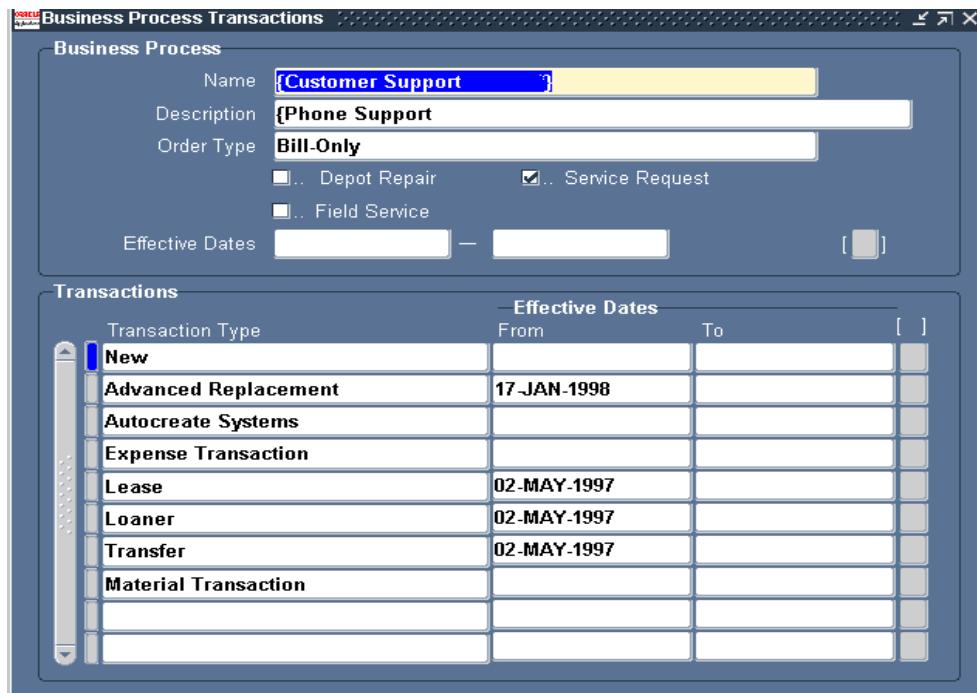


Setup Business Processes

Navigation Path: Customer Support Responsibility > Setup > Installed Base > Business Process Transaction.

The user can define business process transactions on the following screen using the following steps:

- Click on the add icon on the tool bar to add a new record.
- Enter Transaction Type
- Enter Effectivity dates: From and to
- Click on save.



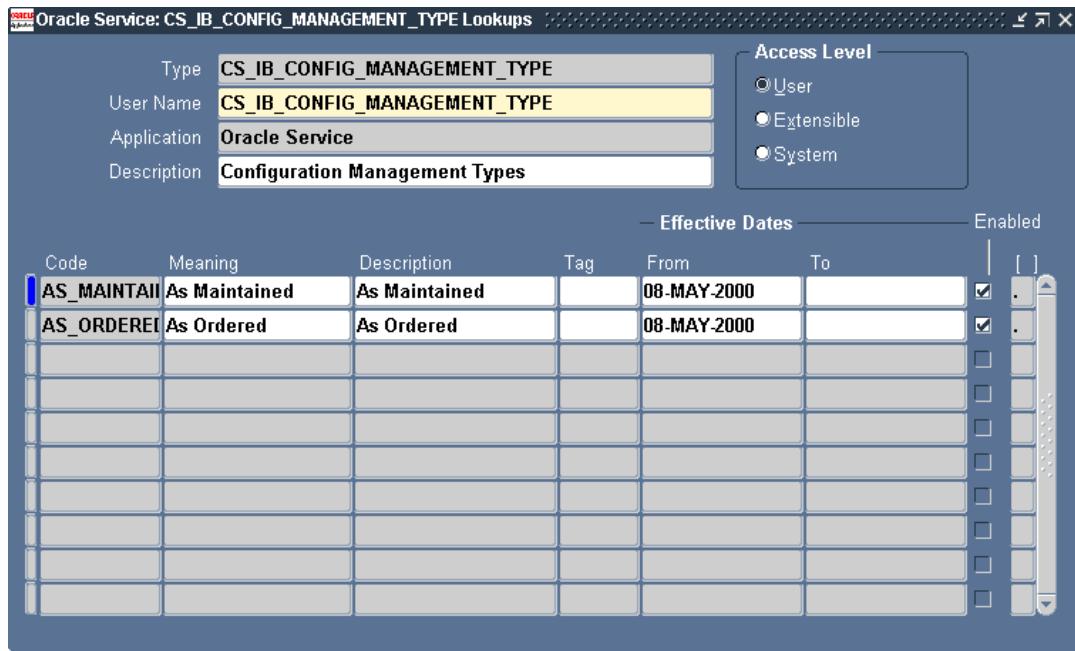
Setup Product Configuration

Navigation Path: Customer Support Responsibility > Setup > Installed Base > Product Configuration.

The user create additional configuration types to the predefined values. To create new configuration type, carry out the following steps:

- Click on the Add icon on the toolbar.
- Enter a code (mandatory field)
- Enter a meaning for the code (mandatory)
- Enter a meaningful description.
- Enter effectivity dates
- Optionally enter a Tag.
- The enabled check box is checked by default when the new row is added

- Click on Save.



Concurrent Programs

In 3i, there was a program called Autocreate Installed Base. It has been replaced by the Installed Base Interface (CSXOCIB). Order lines created in Order Capture / Order Management are sent in to an Advanced Queue which sends a message which is picked up by the concurrent program. The program checks for the following:

- Serviceable flag
- Shipped flag
- Fulfilled flag

If on checking the product on the order line matches this criteria it is picked up by the concurrent program and updates the Installed Base for the customer and Contracts

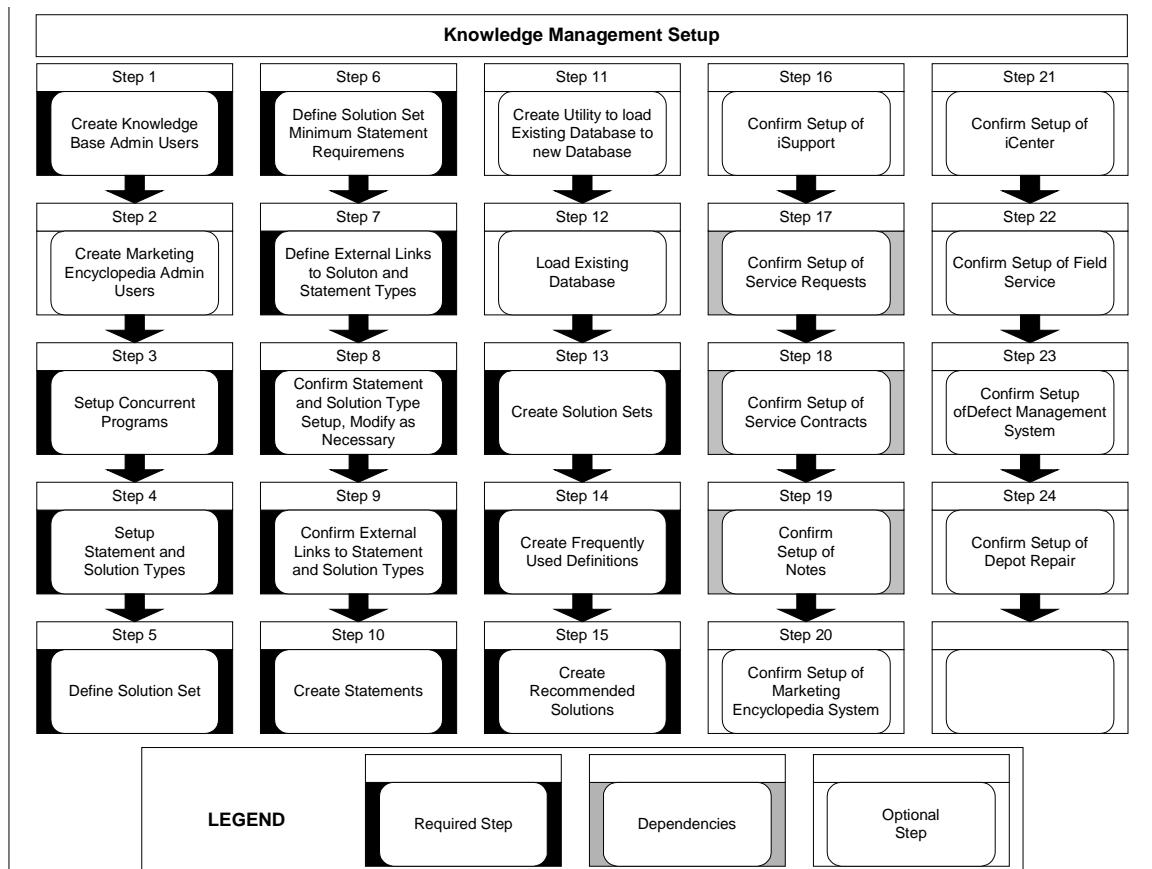
Profile Options

The following Profile Options should be set:

Profile Name	Profile Description
CS_IB_AUTOSPLIT_ON_INSTANTIATION	Automatically split products when instantiating them in the Installed Base.
CS_IB_CONFIG_TYPE_ON_INSTANTIATION	The default configuration type with which a product will be created in the Installed Base.
CS_IB_PATCH	Patch Product name
CS_IB_PATCH_STATUS	Service: Status for a patch item
CS_IB_STATUS_ON_INSTANTIATION	The default status with which a product will be created in the Installed Base
APPS_SERVLET_AGENT	Specifies the forms tech stack server
APPS_WEB_AGENT	Specifies the HTML tech stack server
ACTIVATE_INSTALLED_BASE_PREFERRED_ENGINEERS	This profile is to activate the Installed Base Preferred Engineers option
ACTIVATE_IB_PREFERRED_ENGINEERS	This profile is to activate the Installed Base Preferred Engineers
CS_RMA_STATUS_FOR_NON_REPAIR_LINES	Product Status in the Installed Base when returned for reasons other than repair
CS_RMA_LINE_STATUS_FORM_REPAIR_LINES	Product Status in the Installed Base when returned for repair
CP_REVISION_UPDATE	Controls whether a customer product's current revision is automatically updated when a revision update is ordered for an existing customer product.
SERV_SYSTEM_NAME_UPDATE	Determine whether system name updates are allowed.
SERV_SYSTEM_TERMINATE_CPS	Determines whether system terminate dates should be cascaded to related customer products.
SERV_SYS_TERMINATE_CP_STATUS	Determines the customer product status to apply to related customer products when terminating a system in Define System window.
SYSTEM_NAME_CREATION	Controls whether new system name updates are allowed.

Implementing Knowledge Management

Setup Flowchart



Knowledge Management: Setup and Administration

Step 1 Create Knowledge Base Admin Users

- Create a user using jtlogin.jsp.
- Using jtlogin.jsp, login as JTF administrator. Assign data access roles to created user. Three roles are available for Knowledge Management user: CS_KB_SYS_ADMIN, CS_KB KNOWLEDGE_WORKER, CS_KB_AGENT. Select appropriate role based on desired permission level.
- Using Oracle Applications Forms, assign default responsibility and application by defining JTF System Profile values.

Step 2 Create Marketing Encyclopedia System Admin Users (Optional)

Note: The following steps are used only if MES(Marketing Encyclopedia System) will be used.

1. Create an employee

Using Oracle Forms

- a. Oracle Apps, pick responsibility Human Resource (HR),
- b. Navigate to People, Enter and Maintain
- c. Create a new employee.

2. Associate the created user with the created employee and/or a customer

Using Oracle Applications Forms

- a. Pick System Administrator Responsibility
- b. Navigate to Security and select User
- c. Query the created user
- d. At Employee/Person box, pick the created employee
- e. At Customer box, pick a customer.

3. Create a resource for the employee and grant MES privileges.

- a. Using Oracle Applications Forms
- b. Pick “CRM Resource Manager” responsibility
- c. Navigate to Import Resources,

- d. Query created employee using employee num (not the employee id) and employee name
- e. Click Search.
- f. After getting results, click Create resource.
- g. In Role box, pick the desired MES role (MES Administrator).
- h. Click Save.

Step 3 Setup Concurrent Programs

1. To allow a given responsibility to run some given concurrent requests.

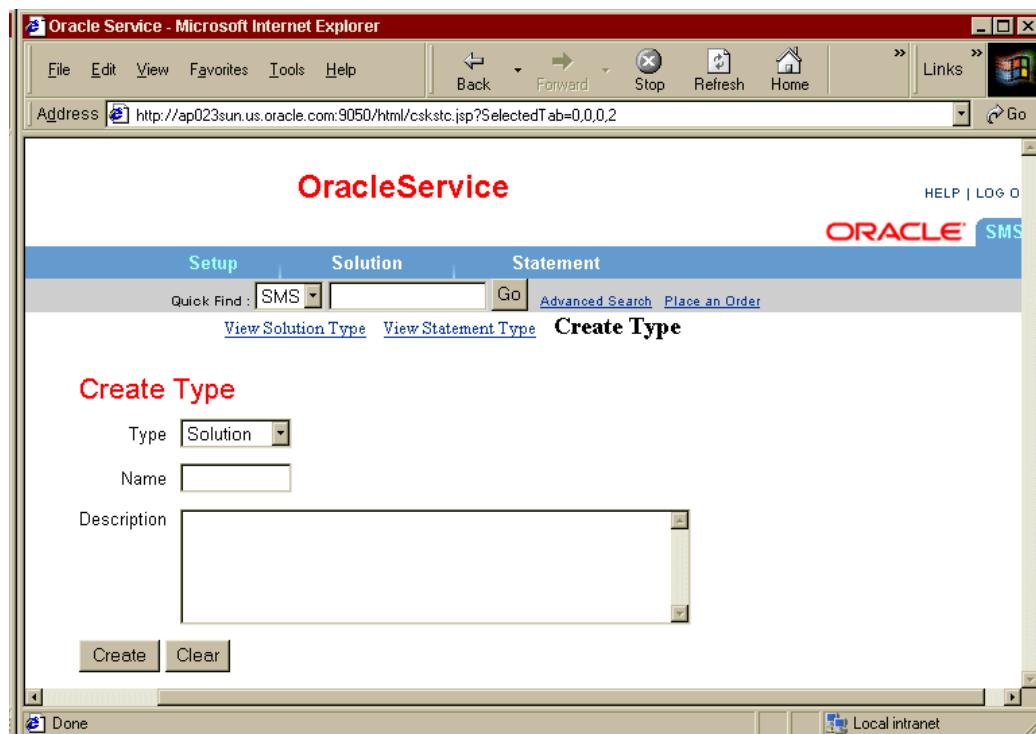
Using Oracle Applications Forms,

- a. Pick System Admin Responsibility.
b. Navigate: Security -> Responsibility -> Define
c. Query given responsibility and get the request group name for that responsibility
d. Navigate: Security -> Responsibility -> Request
e. Query request group name obtained previously
f. Under Request section, add the concurrent request if it does not already exist.
g. Enter the fields: Type = Program, Name = <concurrent program name>
h. Save.
2. To synchronize the InterMedia index,
 - concurrent program name = "Knowledge Base Sync Indexes"
 - short name = CS_KB_SYNC_INDEX
3. To update solution used count for frequently used solutions
 - concurrent program name = "Knowledge Base Update Used Count Summary"
 - short name = CS_KB_UPDATE_USED_CNT
4. To run the concurrent programs,
 - a. Switch responsibility to sys admin
 - b. Navigate: Other -> Request -> View

- c. Click "Submit New Request"
- d. Click "Single request"
- e. Choose program name, enter parameter if needed. (can schedule to run periodically)
- f. Click submit.

5. To view status of the request,
 - a. Navigate: Other -> Request -> View, enter request Id or other criteria or search all request.
 - b. Hit Refresh to see latest status.

Step 4 Setup Statement and Solution Types



Nav >KB Admin Login>Setup>Create Type

Steps for creating types

1. Select Type (Solution, or Statement)
2. Enter Name of Type (i.e. Symptom, Cause, Action, etc.)
3. Enter a description of the Type
4. Select Create
5. Continue creating Types until all Statement and Solution Types are entered

Buttons

- Create - Create a new Type
- Clear - Cancels all changes made on UI

Step 5 Define Solution Set (Statement Type to Solution Set Relationship)**Steps for Defining Solution Set types**

1. Select Solution Set Type to be defined
2. On Solution Type UI under Related, select Statement Types from LOV
3. Select Add/Delete at bottom of Solution Type UI
4. At Associate Statement Types UI, select Statement Types from “Available Statement Types” and use arrows to move selected Types to “Selected Statement Types”
5. Continue selecting Types until Solution Set is fully defined.

View Available Solution Types:



The screenshot shows a Microsoft Internet Explorer window with the title bar "Oracle Service - Microsoft Internet Explorer". The address bar contains the URL "http://ap023sun.us.oracle.com:9050/html/cskstl.jsp?SelectedTab=0,0,0". The main content area is titled "OracleService" and features a navigation bar with tabs: "Setup", "Solution" (which is selected and highlighted in blue), and "Statement". Below the tabs is a search bar with a dropdown menu set to "SMS" and a "Go" button. To the right of the search bar are links for "HELP | LOG OUT" and the "ORACLE SMS" logo. The main content area is titled "View Solution Type" and includes links for "View Statement Type" and "Create Type". The section is titled "Solution Types" and displays a table with three rows of data:

Type No.	Name	Description
10129	Demo1	Demo1 Description a
10	SCA	SCA SEEDED DATA
10169	alam_sol_trash	alam_sol_trash

Nav >KB Admin Login>Setup>Solution Types

Select Solution Type to be defined (such as type #10, SCA)

Solution Type Description:

The screenshot shows a Microsoft Internet Explorer window with the title 'Oracle Service - Microsoft Internet Explorer'. The address bar shows the URL: <http://ap023sun.us.oracle.com:9050/html/cskstv.jsp?setTypeId=10>. The main content is titled 'Solution Type' and shows 'Solution Type No 10'. There are fields for 'Name' (SCA) and 'Description' (SCA SEDED DATA). Below these are buttons for 'Update', 'Restore', and 'Delete'. A 'Related' section is titled 'Statement Types' with a dropdown menu. A table lists the following data:

Type No	Name	Description	Optional
10	Symptom	Symptom element type description a	<input checked="" type="checkbox"/>
11	Cause	Cause element type description	<input checked="" type="checkbox"/>
12	Action	Action element type description	<input checked="" type="checkbox"/>
13	Fact	Fact element type description	<input checked="" type="checkbox"/>
14	Changes	Changes element type description	<input checked="" type="checkbox"/>
15	Objective	Objective type description	<input checked="" type="checkbox"/>

At the bottom are 'Update' and 'Add/Delete' buttons. The status bar at the bottom of the browser window shows 'Done' and 'Local intranet'.

Nav >KB Admin Login>Setup>Solution Types>(select Type)

- Verify that the Solution Type information is correct, update as necessary
- Select “Statement Type” from LOV under “Related”
- No Statement Types will display if this is the initial setup
- Select “Add/Delete”

Columns

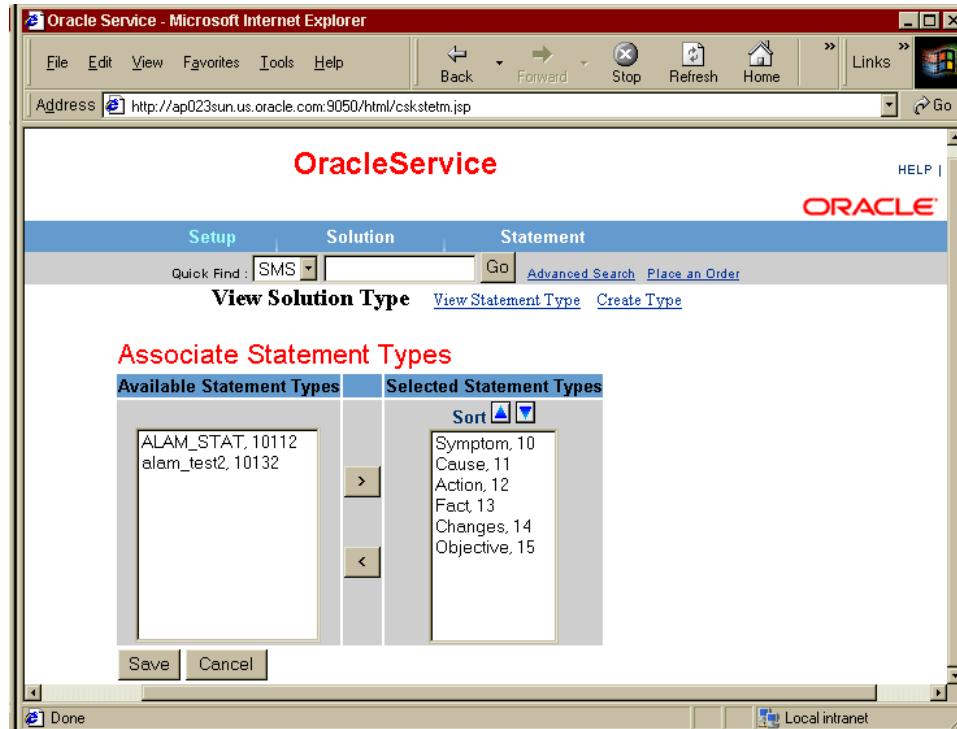
- Type No - Number of Statement Type, system generated
- Name - Statement Type Name
- Description - Description of Statement Type
- Optional - Unchecked indicates the Statement Type is required to create a minimum Solution Set (in an SCA Solution Set, the Symptom and the Action would be required to be a complete Solution Set, the Cause would be optional)

since it may not be known). Checked (default) indicates the Statement is not required to create a minimum Solution Set.

Buttons

- Update - Any changes made on the related UI section are updated/saved.
- Restore - Restores the Solution Type back to the last saved version
- Delete - Deletes the Solution Set if no Statement associations exist
- Add/Delete - Brings up the “Associate Statement Types” UI to allow Statement Types to be added or deleted from the Solution Set.

Create Solution Set to Statement Associations:



Nav->KB Admin Login>Solution Type>(select Type)>(select Related Type)>Add/Delete>Associate Statement Types

Steps for associating Statement types with Solution Set Types

- Select Statement Types from “Available Statement Types” and use right arrow to move to “Selected Statement Types”. Note: Order is not critical.
- Continue until all desired Statements have been moved to “Selected Statement Types”
- Select “Save”

Columns

- Available Statement Types - List of defined Statement Types not currently part of selected Solution Set
- Selected Statement Types - List of Statement Types currently part of selected Solution Set

Buttons

- Right arrow - Moves selected item from “Available Statement Types” to “Selected Statement Types” (Adds Statement to Solution Set)
- Left arrow - Moves selected item from “Selected Statement Types” to “Available Statement Types” (Deletes Statement from Solution Set)
- Sort - Allows Statements to be sorted in either ascending or descending order
- Save - Saves a new/updated Solution Set
- Clear - Cancels all changes made on UI

Step 6 Define Solution Set Minimum Statement Requirements

The screenshot shows a Microsoft Internet Explorer window with the title 'Oracle Service - Microsoft Internet Explorer'. The address bar shows the URL: <http://ap023sun.us.oracle.com:9050/html/cskstv.jsp?setTypeId=10>. The main content is titled 'Solution Type' and shows a configuration for 'Solution Type No 10'. The configuration includes a 'Name' field (SCA) and a 'Description' field (SCA SEEDED DATA). Below this are buttons for 'Update', 'Restore', and 'Delete'. A 'Related' section is present, with a dropdown menu set to 'Statement Types'. A table lists statement types with their type numbers, names, descriptions, and optional status (checked checkboxes). At the bottom are 'Update' and 'Add/Delete' buttons.

Type No	Name	Description	Optional
10	Symptom	Symptom element type description a	<input checked="" type="checkbox"/>
11	Cause	Cause element type description	<input checked="" type="checkbox"/>
12	Action	Action element type description	<input checked="" type="checkbox"/>
13	Fact	Fact element type description	<input checked="" type="checkbox"/>
14	Changes	Changes element type description	<input checked="" type="checkbox"/>
15	Objective	Objective type description	<input checked="" type="checkbox"/>

Nav->KB Admin Login>Solution Type>(select Type)>(select Related Type)

Note: This screen automatically pops up after making a change on the previous screen

Steps for defining Minimum Solution Set Requirements

- Select Statement Types from "Related"
- Uncheck specific statements that are required for a minimum Solution Set
- Select "Update"

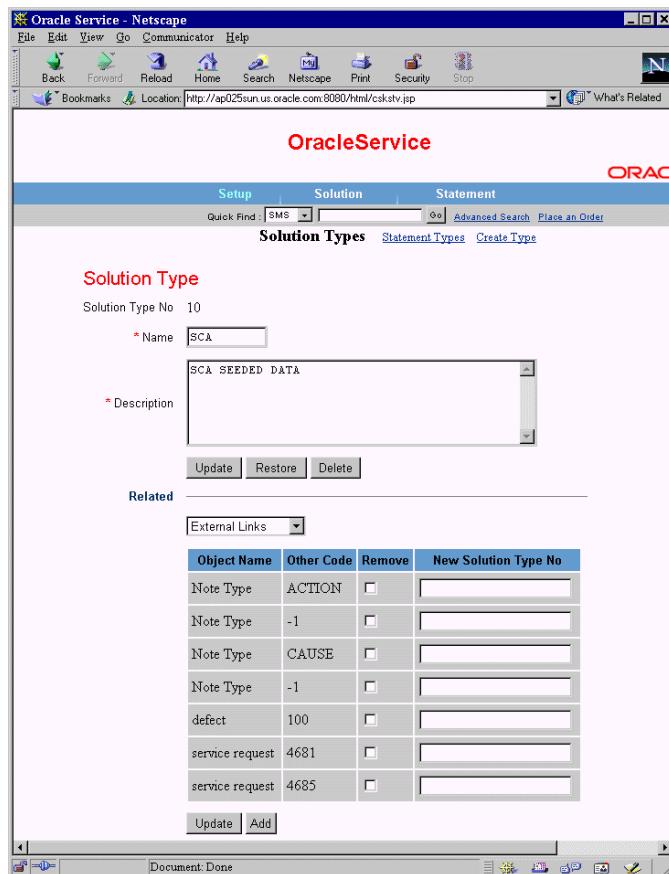
Columns

- Type No - Number of Statement Type, system generated
- Name - Statement Type Name
- Description - Description of Statement Type
- Optional - Unchecked indicates the Statement Type is required to create a minimum Solution Set (in an SCA Solution Set, the Symptom and the Action would be required to be a complete Solution Set, the Cause would be optional since it may not be known). Checked (default) indicates the Statement is not required to create a minimum Solution Set.

Buttons

- Update - Any changes made on the related UI section are updated/saved.
- Restore - Restores the Solution Type back to the last saved version
- Delete - Deletes the Solution Set if no Statement associations exist
- Add/Delete - Brings up the “View Solution Type” UI to allow Statement Types to be added or deleted from the Solution Set.

Step 7 Define External Links To Solution and Statement Types



Nav->KB Admin Login>Solution Type>(select Solution Type Number)>(select External Link)

Steps for modifying Solution Types

- If changing “Name”, type in a new Name
- If changing “Description”, type in changes
- Select “Update” if any changes made
- Select “Restore” if you wish to reset to previously saved definitions

- Select “Delete” if you wish to delete the Solution Set.

Note: System will not allow the “Delete” to be performed if there are existing Statements tied to the Solution Set.

Related Section:

Note: For removing or creating new Statement or External Link Associations if Solution Set is to be deleted:

- To Remove existing Statement or External Links, select the “Remove” box for each.
- To remove existing Statement or External Link and create it for new Solution Type, enter in the new Solution Type Number for each.
- To Add an External Link, select the “Add” button, this will bring up a new window with a selection of external objects which are available to add to the Solution Set
- Select “Update” to save changes

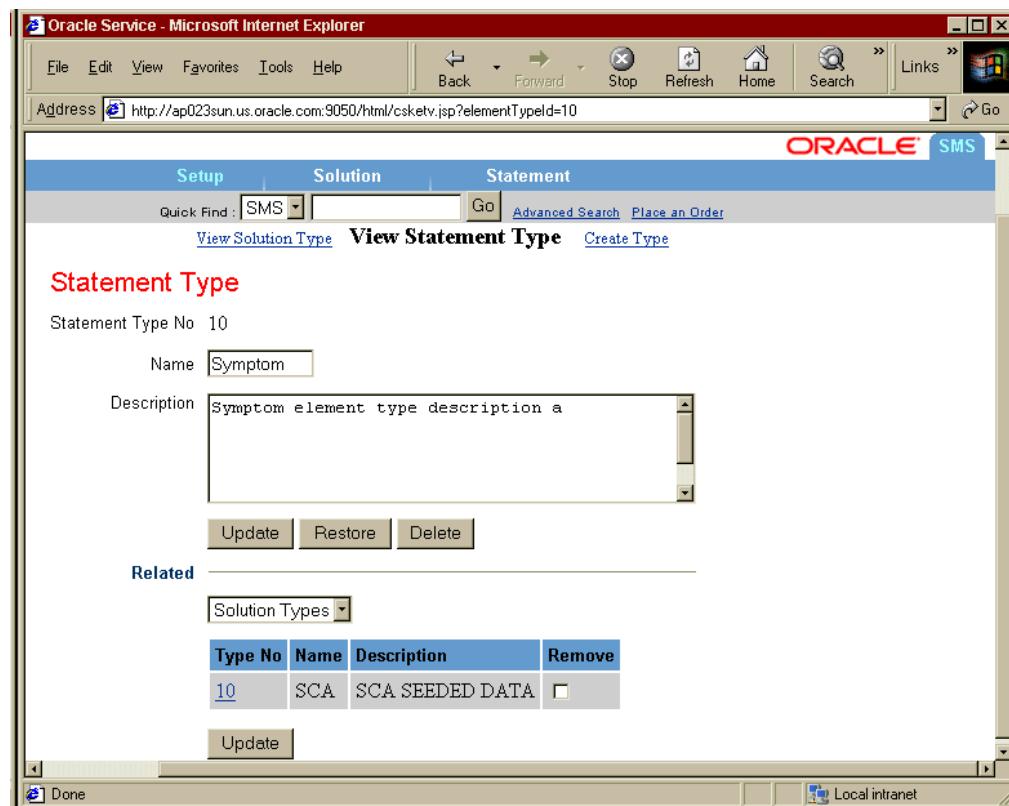
Columns

- Object Name - Name of object such as “Note Type” or “Defect”
- Other Code - Descriptive name such as “Symptom” or “Action”
- Remove - Select item for removal from existing Solution Type
- New Solution Type Number - The new Solution Type number the item will be associated with

Buttons

- Update - Any changes made on the related UI section are updated/saved.
- Restore - Any changes made will revert back to the previously saved definitions
- Delete - Deletes the Solution Type if there are no Statement or External Link associations
- Add - Allows the addition of an External Link to the Solution Type

Step 8 Confirm Statement Type Setup, Modify as Necessary



Nav->KB Admin Login>Statement Type> (select Type No.)

Steps for modifying Statement Types

- If changing “Name”, type in a new Name
- If changing “Description”, type in changes
- Select “Update” if any changes made
- Select “Restore” if you wish to reset to previously saved definitions
- Select “Delete” if you wish to delete the Statement Type

Note: System will not allow the “Delete” to be performed if the Statement Type is associated with a Solution Set.

Related Section:

Note: For removing the Statement Type association from a Solution Type

- To Remove existing Statement or External Links, select the “Remove” box.
- Select “Update” to save changes

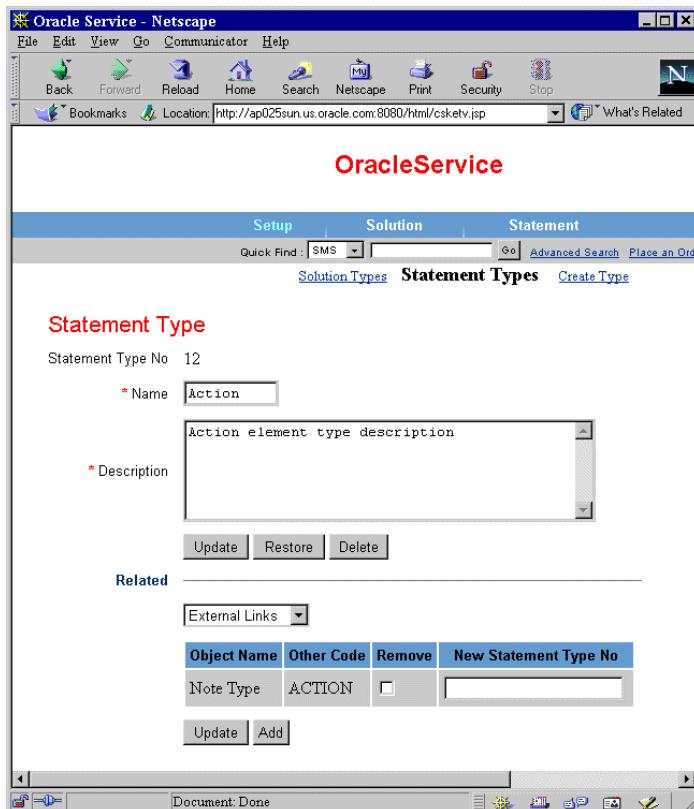
Columns

- Type Number - Type number for the Solution Type
- Name - Solution Type Name
- Description - Solution Type Description
- Remove - Select to remove Statement Type association from existing Solution Set

Buttons

- Update - Any changes made on the related UI section are updated/saved.
- Restore - Any changes made will revert back to the previously saved definitions
- Delete - Deletes the Statement Type if there are no Solution Type or External Link associations

Step 9 Confirm External Links to Statement Types



Nav->KB Admin Login>Statement Type> (select Type No.)>(select External Links)

Steps for modifying External Links to Statement Types

- If changing “Name”, type in a new Name
- If changing “Description”, type in changes
- Select “Update” if any changes made
- Select “Restore” if you wish to reset to previously saved definitions
- Select “Delete” if you wish to delete the Statement Type

Note: System will not allow the “Delete” to be performed if the Statement Type is associated with a Solution Set.

Related Section:

Note: For removing the External Link association from a Statement Type

- To Remove existing External Links, select the “Remove” box for each
- To create a new Statement Type association for the External Link, type in the Statement Type number
- Select Add to link an External Object to the Statement Type, a new screen will pop up to display a selection of external objects
- Select “Update” to save changes

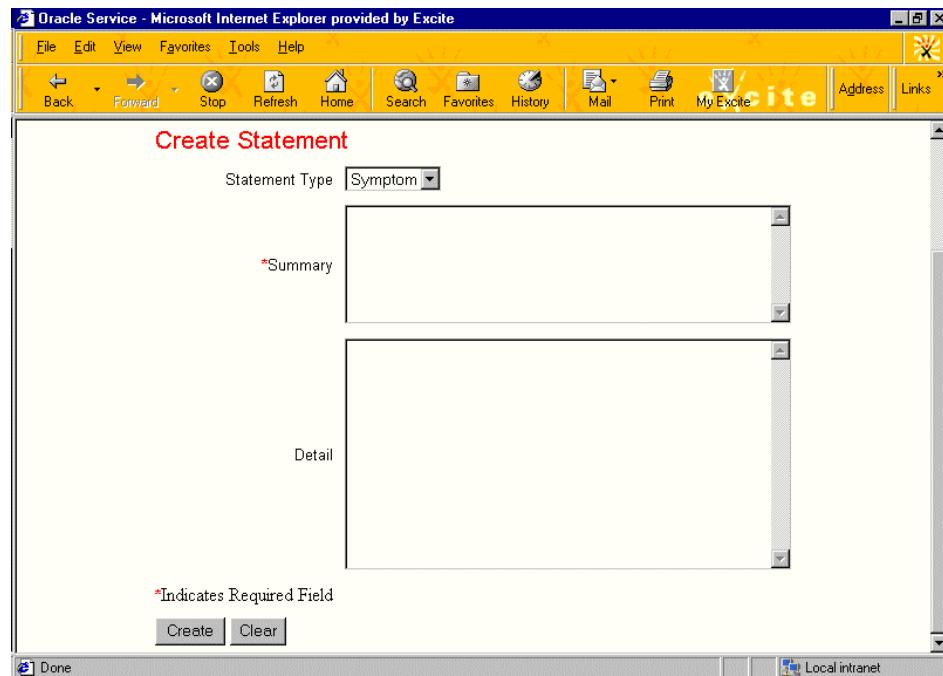
Columns

- Object Name - Name of object such as “Note Type” or “Defect”
- Other Code - Descriptive name such as “Symptom” or “Action”
- Remove - Select item for removal from existing Statement Type
- New Statement Type Number - The new Statement Type number the item will be associated with

Buttons

- Update - Any changes made on the related UI section are updated/saved.
- Restore - Any changes made will revert back to the previously saved definitions
- Delete - Deletes the Solution Set if there are no Statement or External Link associations
- Add - - Allows the addition of an External Link to the Statement Type

Step 10 Create Statements



Oracle Service - Microsoft Internet Explorer provided by Excite

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print My Excite Address Links

Create Statement

Statement Type

*Summary

Detail

*Indicates Required Field

[Done](#) Local intranet

Nav->KB Admin Login>Statement>Create

Steps for creating Statements

- Select Statement Type
- Enter Statement information into Summary and optionally the Description area
- Select “Create” to save information
- Select “Clear” to delete unsaved information and clear the screen

Buttons

- Create - Saves any information entered into the Summary and Detail areas
- Clear - Clears all information off the screen, any unsaved information will be lost.

Step 11 Create Utility to Load Existing Database to New Database

Definition of Utility will depend on Merchant Database Definition

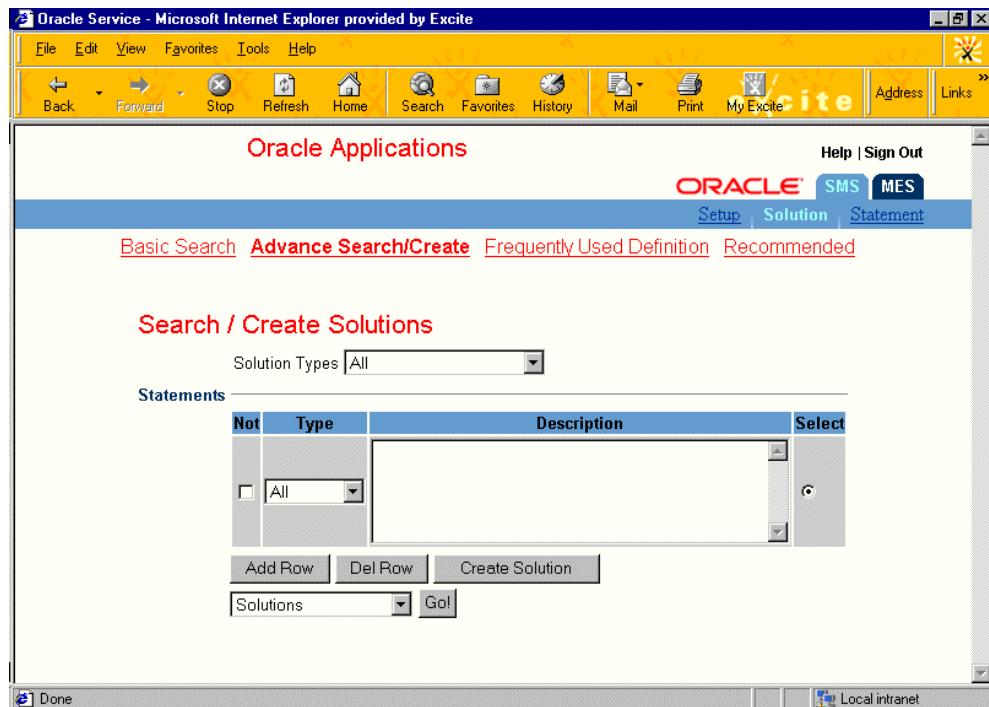
Steps for defining and creating a utility to load existing Merchant Solution information into Knowledge Management System

- Review existing solution database for the following:
 - Maximum Information entity size
 - Existing Statement terminology
 - Existing Solution Set terminology
 - Categorize the different types of information available based on whether it is a typical problem/solution entity or can be considered documentation such as white papers, tech bulletins, product manual sets, etc.
 - Determine the number of different product types desired
 - Do the information entities consist of statement types with titles or are they large globs of information
- Review the following CRM Knowledge Management structure
 - Statements consist of
 - * Title: 80 Characters
 - * Summary: Varchar2 or 2K bytes (faster than using Detail)
 - * Detail: CLOB or 2 Gigabytes
 - * No significant limit on number of types
 - Solutions consist of
 - * Solution Title: 80 characters
 - * Any number of Statements
 - * Multiple Solution Types can coexist

Step 12 Load Existing Database

Steps to load will depend on Utility

Step 13 Create Solution Sets



Nav->KB Admin Login>Solution>Advance Search/Create

Steps for creating solution sets

- Select Statement Type
- Enter Statement information Description area
- Select “Add Row” if entering another statement type
- Select “Del Row”, if a statement has been entered in error and you wish to remove it from the Solution
- Select “Not” to indicate that a statement such as a Fact is not true for the particular solution. Example: The system runs on NT, but the error is not exclusive to NT operating systems.
- Once all statements have been entered, select “Create Solution”

Columns

- Not - Indicates that Statement is either Not significant or is proven to not be part of the solution
- Type - Statement Type Name
- Description - A description of the statement, be it a Symptom, a Cause or?
- Select - If selected, indicates that the selected statement is the one currently open for editing

Buttons

- Add Row - Select if you wish to add another Statement to the Solution
- Del Row - Delete a Statement. The Statement must be a selected Statement
- Create Solution - Performs a window pop to allow a Solution title to be added
- Go - Searches for similar statements

Step 14 Frequently Used Solutions Definition

The screenshot shows a Microsoft Internet Explorer window with the title 'Oracle Service - Microsoft Internet Explorer provided by Excite'. The address bar shows 'http://www.oracle.com'. The page content is titled 'Oracle Applications' and features a navigation bar with 'ORACLE', 'SMS', 'MES', 'Setup', 'Solution', and 'Statement' buttons. Below the navigation bar, there are links for 'Basic Search', 'Advance Search/Create', 'Frequently Used Definition' (which is highlighted in red), and 'Recommended'. The main content area is titled 'Frequently Used Definitions' and contains a table with the following data:

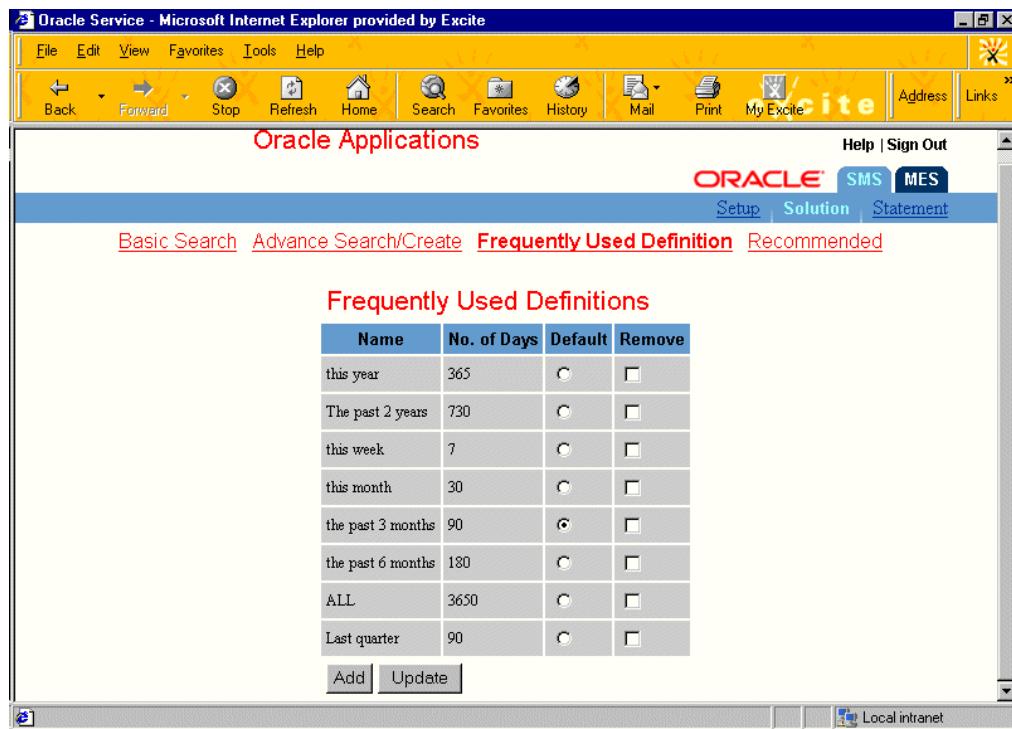
Name	No. of Days	Default	Remove
this year	365	<input type="radio"/>	<input type="checkbox"/>
The past 2 years	730	<input type="radio"/>	<input type="checkbox"/>
this week	7	<input type="radio"/>	<input type="checkbox"/>
this month	30	<input type="radio"/>	<input type="checkbox"/>
the past 3 months	90	<input checked="" type="radio"/>	<input type="checkbox"/>
the past 6 months	180	<input type="radio"/>	<input type="checkbox"/>
ALL	3650	<input type="radio"/>	<input type="checkbox"/>
Last quarter	90	<input type="radio"/>	<input type="checkbox"/>

At the bottom of the table are 'Add' and 'Update' buttons. The status bar at the bottom of the browser window shows 'Local intranet'.

Nav->KB Admin Login>Solution>Frequently Used Definition

Steps for defining a Frequently Used Solution

- If the desired parameter is available, select it by selecting “Default” and then “Update”
- If a parameter needs to be removed, remove it by selecting the “Remove” selection and then “Update”
- If a desired parameter is not available, add it by selecting “Add”, the following window will pop up:



The screenshot shows a Microsoft Internet Explorer window titled "Oracle Service - Microsoft Internet Explorer provided by Excite". The address bar shows "http://excite/oracle". The page content is for "Oracle Applications". At the top, there are links for "Basic Search", "Advance Search/Create", "Frequently Used Definition" (which is highlighted in red), and "Recommended". Below this is a table titled "Frequently Used Definitions". The table has columns for "Name", "No. of Days", "Default", and "Remove". The data in the table is as follows:

Name	No. of Days	Default	Remove
this year	365	<input checked="" type="radio"/>	<input type="checkbox"/>
The past 2 years	730	<input checked="" type="radio"/>	<input type="checkbox"/>
this week	7	<input checked="" type="radio"/>	<input type="checkbox"/>
this month	30	<input checked="" type="radio"/>	<input type="checkbox"/>
the past 3 months	90	<input checked="" type="radio"/>	<input type="checkbox"/>
the past 6 months	180	<input checked="" type="radio"/>	<input type="checkbox"/>
ALL	3650	<input checked="" type="radio"/>	<input type="checkbox"/>
Last quarter	90	<input checked="" type="radio"/>	<input type="checkbox"/>

At the bottom of the table are two buttons: "Add" and "Update".

- Add the new parameter by providing a new “Name”, a “Description”, and the “No. of Days”.
- Select “Save” if all is correct
- Select “Cancel” if you wish to cancel the definition.

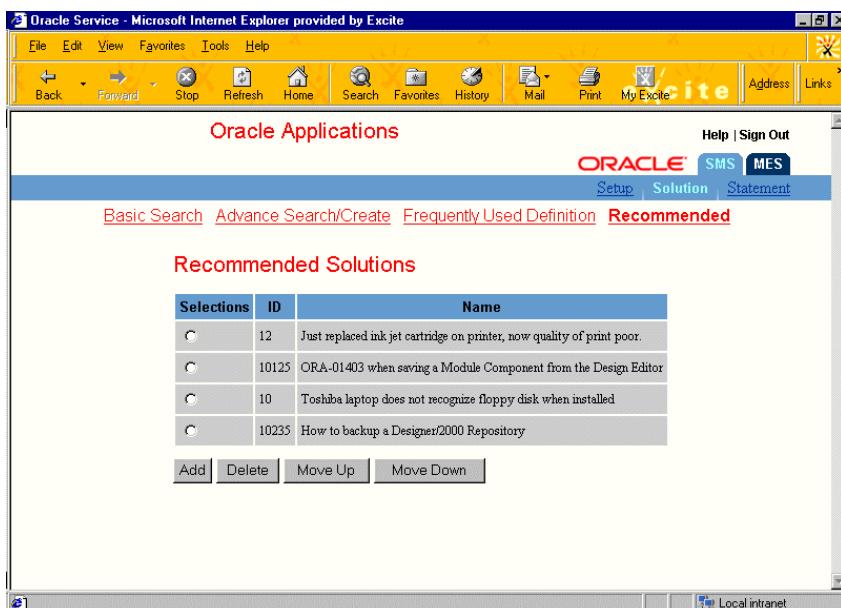
Columns

- Name - The name of the Frequently Used Definition
- No. of Days - The number of days to be used in determining what frequently used solutions will display
- Default - Selected to indicate that this is the default for “Frequently Used”
- Remove - Used to remove any definitions that are no longer required

Buttons

- Add - Select if you wish to add another definition to the Frequently Used Definition list
- Update - Saves any change made to the definition list
- Save - “Add Definition”, Saves new definition
- Cancel - “Add Definition”, Cancels the “Add Definition” operation

Step 15 Recommended Solutions Setup

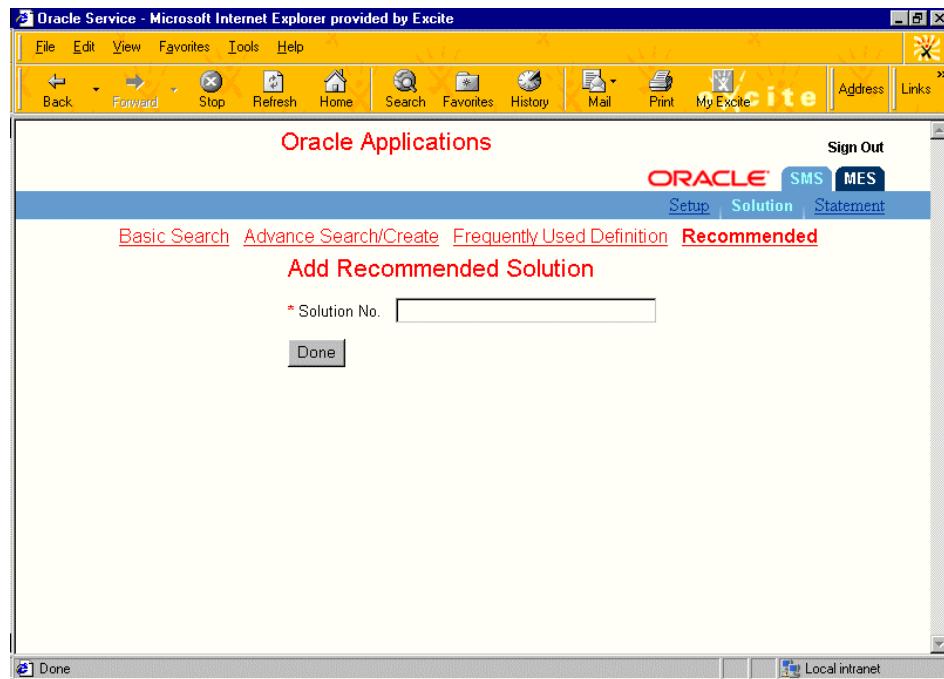


The screenshot shows a Microsoft Internet Explorer window with the title 'Oracle Service - Microsoft Internet Explorer provided by Excite'. The address bar shows 'http://192.168.1.100:8080/oracle/applications'. The page header includes 'Oracle Applications', the 'ORACLE' logo, and links for 'SMS' and 'MES'. Below the header, there are navigation links for 'Setup', 'Solution', and 'Statement'. The main content area is titled 'Recommended Solutions' and displays a table with four rows of data. The table columns are 'Selections', 'ID', and 'Name'. The data rows are:

Selections	ID	Name
<input type="radio"/>	12	Just replaced ink jet cartridge on printer, now quality of print poor.
<input type="radio"/>	10125	ORA-01403 when saving a Module Component from the Design Editor
<input type="radio"/>	10	Toshiba laptop does not recognize floppy disk when installed
<input type="radio"/>	10235	How to backup a Designer2000 Repository

Below the table are buttons for 'Add', 'Delete', 'Move Up', and 'Move Down'.

Nav->KB Admin Login>Solution>Recommended



Steps for defining the Recommended Solutions List

- Select "Add" to bring up the "Add" screen if no Solutions is on the initial list.
- Input the desired Solution Number
- Select "Done" and continue operation until all desired Solutions are on the list
- Select the Solution and the "Delete" button if you wish to delete a Solution from the list
- Select a Solution and the "Move Up" or "Move Down" if you wish to reorganize the order in which the Solutions are to be displayed

Columns

- Selections - Used to select Solutions to be Deleted or Moved
- ID - The Solution number
- Name - The Solution Title

Buttons

- Add - Pops up the “Add” screen
- Delete - Deletes any selections from the list
- Move Up - Moves a Solution up one line
- Move Down - Moves a Solution down one line
- Done - “Add Recommended Solution”, Once the solution number is entered, indicates that you are done and moves you back to the previous screen

Step 16 Confirm Setup of iSupport (Optional)

Review iSupport Implementation Document

Step 17 Confirm Setup of Service Requests

Review Support Implementation Document

Step 18 Confirm Setup of Service Contracts

Review Support Implementation Document

Step 19 Confirm Setup of Notes

Review Support Implementation Document

Step 20 Confirm Setup of Marketing Encyclopedia System (Optional)

Review Marketing Encyclopedia System Implementation Document

Step 21 Confirm Setup of iCenter (Optional)

Review iCenter Implementation Document

Step 22 Confirm Setup of Field Service (Optional)

Review Field Service Implementation Document

Step 23 Confirm Setup of Defect Management (Optional)

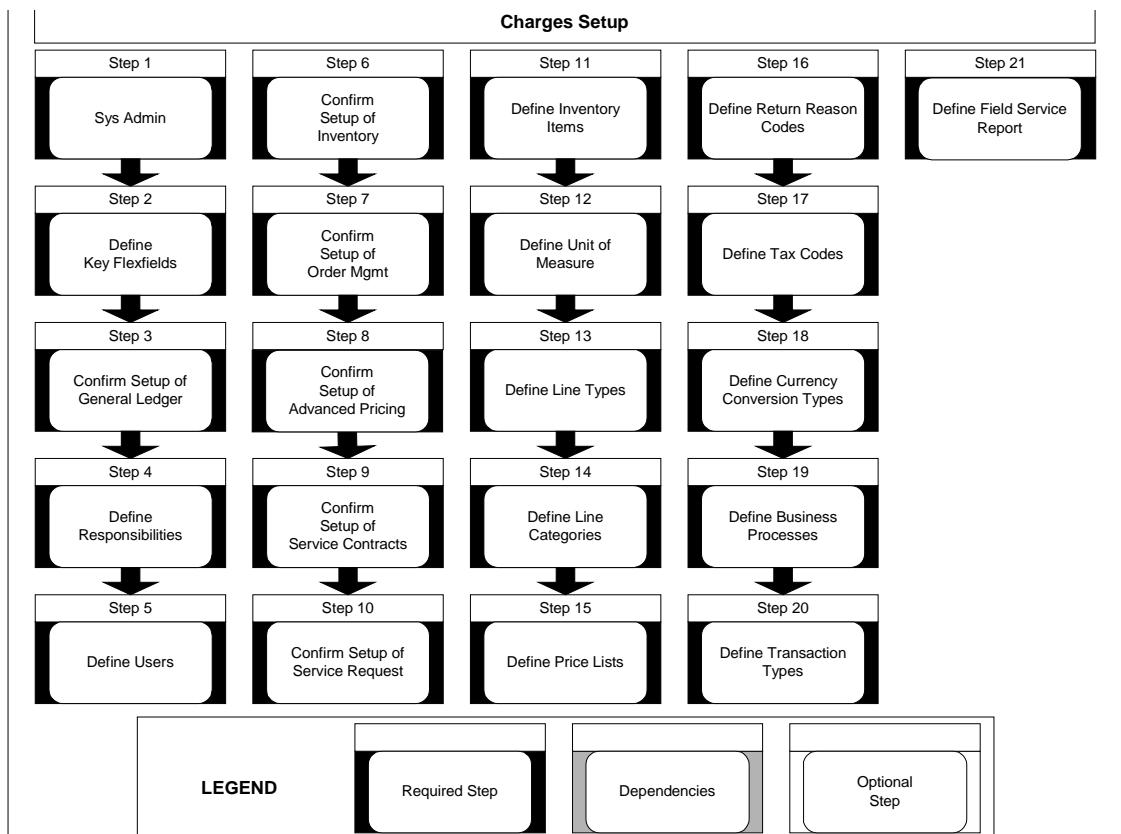
Review Defect Management Implementation Document

Step 24 Confirm Setup of Depot Repair (Optional)

Review Depot Repair Implementation Document

Implementing Charges

This topic group provides general descriptions of the setup and configuration tasks required to implement the application successfully.



Setting Up Charges

Overview

Charges is a component used by many Oracle Applications. Oracle Service, Oracle Field Service and Oracle Depot Repair are examples. See [Understanding Charges](#) for more information.

Prerequisites

Confirm the setup of all products that will be using Charges, for example, Oracle Service, Oracle Field Service, etc.

Steps

Step Number	Required?	Setup Step Description
Step 1	Required	Confirm setup of Inventory Items See: Implementing Oracle Inventory
Step 2	Required	Confirm setup of Unit of Measure See: Implementing Oracle Inventory
Step 3	Required	Confirm setup of Line Types See: Implementing Oracle Order Management
Step 4	Required	Confirm setup of Price Lists See: Implementing Oracle Order Management
Step 5	Required	Confirm setup of Line Categories See: Implementing Oracle Order Management
Step 6	Required	Confirm setup of Return Reason Codes See: Implementing Oracle Order Management
Step 7	Required	Confirm setup of Tax Codes See: Implementing Oracle Accounts Receivables
Step 8	Required	Confirm setup of Currency Conversion Types See: Implementing Oracle General Ledger
Step 9	Required	Confirm setup of Business Processes See: Implementing Install Base

Step Number	Required?	Setup Step Description
Step 10	Required	Confirm setup of Transaction Types See: Implementing Installed Base
Step 11	Required	Confirm setup of Field Service Report See: Implementing Oracle Field Service

Profile Options

Set profile options for Charges according to the following table.

Table 0-1

Profile Option Name	Possible Values	Use r	Res p	App	Site	Functionality
Service: Default Material Item	Any Item in the Item Master (MTL_SYSTEM_ITEMS) with Material_Billable_Flag = "M" or null	x	x	x	x	Charges Window rolls up all of the Charge Line with an Material Item Number (Item Master Attribute) and the Roll-up Checkbox checked and passes the total along with this Item Number to OC/OM (creates 1 Order/Invoice Line instead of several)
Service: Default Labor Item	Any Item in the Item Master (MTL_SYSTEM_ITEMS) with Material_Billable_Flag = "L"	x	x	x	x	Charges Window rolls up all of the Charge Line with an Labor Item Number (Item Master Attribute) and the Roll-up Checkbox checked and passes the total along with this Item # OC/OM (creates 1 Order/Invoice Line instead of several)
Service: Product Status when Returned for Repair	Any status code in CS_CUSTOMER_PRODUCT_STATUSES	x	x	x	x	Used to update the status of Installed Base Items returned for repair when the OM Return Line does not have Installation Details with a Transaction Type Code that has an Installed Product Status Code on it

Implementing Counters

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Setting Up Counters

Counters is a component used by many Oracle Applications. Oracle Service and Oracle Service Contracts are examples.

Prerequisites

Confirm the setup of all products that will be using Counters, for example, Oracle Service.

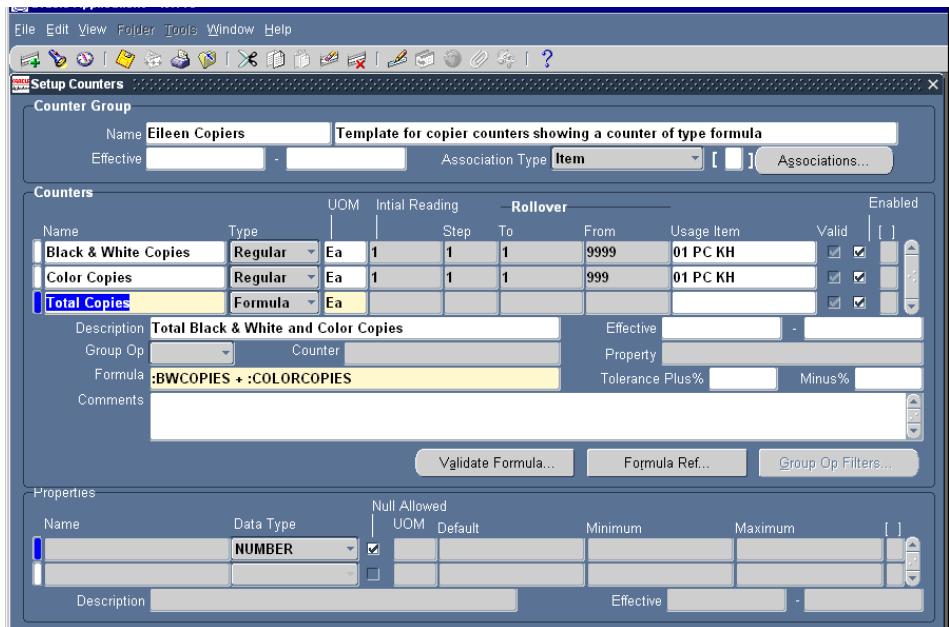
Steps

Step Number	Required?	Setup Step Description
Step 1	Required	Confirm setup of Inventory Items See: Implementing Inventory
Step 2	Required	Confirm setup of Unit of Measure See: Implementing Inventory
Step 3	Required	Define Counter Group templates See: Implementing Counters, Defining Counter Groups
Step 4	Optional	Define Regular Counters See: Implementing Counters, Defining Regular Counters

Step Number	Required?	Setup Step Description
Step 5	Optional	Define Group Function Counters See: Implementing Counters, Defining Group Function Counters
Step 6	Optional	Define Formula Counters See: Implementing Counters, Defining Formula Counters
Step 7	Optional	Define Time Based Counters See: Implementing Counters, Defining Time Based Counters
Step 8	Optional	Confirm Concurrent Program Time Based Counters Engine See: Concurrent Programs
Step 9	Required	Define System Profile Options See: Implementing Counters, Setting System Profile Options
Step 10	Required	Define Profile Options See: Implementing Counters, Setting Profile Options
Step 11	Required	Instantiate Counters See: Implementing Counters, Instantiate Counters and Implementation documentation for the product that is using the Counters component.

Defining Counters

The following screen is used for setting up and defining all Counter Groups and their individual Counters.



Defining Counters Groups

Feature Name	Function
Counter Group	Defines the counter template used for associated with products, services and contract lines
Associate Button	Pops a window to link Counter Groups with Inventory Items that are Serviceable, Support Services, or Usage Item
Counters	Defines the individual counters in the Counter Group template. Counters can be Physical (Type: Regular) or Logical (Types: Regular, Group Function, Formula, Time Based).
Validate Formula... Button	Validates entered formula as a valid SQL expression for Formula Counters
Formula Ref...Button	Pops a window to allow definition of the References used in the formula
Properties	Defines additional counter reading properties for Regular Counters only

Use this procedure to define counters groups and their counters, counter properties and associate them with the products or services.

Prerequisites

None

Steps

1. Navigate to **Setup**.
2. Click **Setup**.
3. Click **Counters**.
4. Click **Define Counters**.
5. Complete the **Counter Group** heading information; identify the name, description and effective dates.
6. **Associate** the Counter Group with **BOM, Item or Service**. The list of values for BOM and Item is based on Master Items that have been identified as Serviceable Products. The list of values for Service is based on Master Items that have been identified as Support Services. These flags are set in the Master Items UI on the Service tab. Both BOM and Item will present the same list of values.
 - See **Implementing Inventory** for more information.
7. Define the **Counters Lines** by identifying the Counter Type, Unit of Measure (UOM), the Initial Reading and other related information. Counter Types are **Regular, Group Function, Formula or Time Based**. See the following for more details:
 - Defining Regular Counters
 - Defining Group Function Counters
 - Defining Formula Counters
 - Defining Time Based Counters
8. For Counter Types of Regular only you can define additional **Properties** for **Data Types of Character, Number and Date**.
9. From the toolbar menu, select the **Save** icon.

Defining Regular Counters

Use this procedure to define counters of the type Regular. These are the types of counters that are physical types of counters found in tangible objects like automobiles, gas meters, photo copy machine, etc. Regular counters could also be logical counters. For example, if the number of service calls per customer is tracked

manually you would setup a counter of type Regular and have the agents increment the counter after each call.

Prerequisites

None

Steps

1. Navigate to **Setup**.
2. Click **Setup**.
3. Click **Counters**.
4. Click **Define Counters**.
5. Complete the **Counter Group** information
6. Define the **Counter Name** and select **Regular** for Type.
7. Select the **Unit of Measure (UOM)**.
8. Enter the **Initial Reading** of the counter. For example, an automobile may have an initial reading at the dealer of 230 miles due to testing and delivery millage.
9. Identify the counter incremental **Step** number. For example, if you wish the counter to be incremented by one for each reading then enter 1 for the Step.
10. Enter the **Rollover To** and **From** minimum and maximum counter numbers. For example, a counter on an automobile may start at 000000 and go until 999999 before it rolls over to 000000. If the counter is reset, it will start with the Rollover To count, in this case 000000.
11. Select the **Usage Item** for this counter. The list of values for Usage Item is based on Master Items that have been identified as Usage Items. This flag is set in the Master Items UI on the Service tab for Serviceable Items.
 - See **Implementing Inventory** for more information.
12. Identify an additional counter **Description** and **Effective** dates.
13. Identify the **Tolerance Plus** and **Minus** percentage figures for the counter. Tolerance is used by Oracle Service Contract's Events to determine the range within which the counter is updated.
14. Identify additional **Properties**. Properties can be of **Data Type Character, Number or Date**. For example, **Property Name** could be Reader with a Data

Type of Character. When the counter reading is captured the name of the person that took the actual reading could be entered.

15. Enter any additional **Description** for the Property and identify the **Effective** dates.

Defining Group Function Counters

Use this procedure to define counters of the type Group Function. This type allows you to derive counters using SUM and COUNT. Group Function counters can be used in Formula Counters.

Prerequisites

Must have Counters in the Counter Group to use in the Group Function Counters.

Steps

1. Navigate to **Setup**.
2. Click **Setup**.
3. Click **Counters**.
4. Click **Define Counters**.
5. Complete the **Counter Group** information.
6. Define the **Counter Name** and select **Group Function** for Type.
7. Select the **Unit of Measure (UOM)**.
8. Select the **Usage Item** for this counter. The list of values for Usage Item is based on Master Items that have been identified as Usage Items. This flag is set in the Master Items UI on the Service tab for Serviceable Items.
 - See Implementing Inventory for more information.
9. Identify counter **Description** and **Effective** dates.
10. Select the **Group Operation** of either SUM or COUNT. SUM will total all reading history for the counter and provide an accumulated total of the counter readings. COUNT will count the total number of readings that have occurred prior to resetting the counter. For example, take a Counter that had three reading and was reset after each reading. If the three readings were 100, 100, 100 then SUM would calculate 300 and COUNT would return 3.

11. Identify the **Tolerance Plus** and **Minus** figures for the counter. Tolerance is used by Oracle Service Contract's Events to determine the range within which the counter is updated.
12. Enter any **Comments** desired.
13. Click the **Group Operation Filter** button and the Counter Filter UI will pop up.
14. Complete the Counter Filter information for the Properties.
15. From the toolbar menu, select the **Save** icon.

Defining Formula Counters

Use this procedure to define counters of the type Formula. Formula type counters allow you to use simple math to derive the counter value. For example you may have a photocopy machine that provides black & white copies and color copies. You may wish to track the total number copies. You would create a Counter Group with three Counters;

- A Regular counter for total black & white copies
- A Regular counter for the total color copies
- A Formula counter for the total black & white + the total color copies.

Prerequisites

Existing Counters in the Counter Group.

Steps

1. Navigate to **Setup**.
2. Click **Setup**.
3. Click **Counters**.
4. Click **Define Counters**.
5. Complete the **Counter Group** information
6. Complete the definition of Counters that will be used in the Formula Counter. For example, create one Regular type Counter to track black & white copies and create another Regular type Counter to track color copies.
7. Create a Counter of type **Formula**.
8. Select the **Unit of Measure (UOM)**.

9. Select the **Usage Item** for this counter. The list of values for Usage Item is based on Master Items that have been identified as Usage Items. This flag is set in the Master Items UI on the Service tab for Serviceable Items.
 - See **Implementing Inventory** for more information.
10. Identify an additional counter **Description** and **Effective** dates.
11. Enter the formula you wish to use for the counter. The syntax is any valid expression in standard SQL, use your own formula reference names, preseeded by the':' symbol. For example to create a formula for adding the number of black & white copies and the number of color copies you would enter
 - **:BWCOPIES +:COLORCOPIES**
 - An example of an advance formula, using a SQL function, would be creating a counter that would be used to billing determination. If you wish to bill only after the first 500 copies you would need to create a formula to calculate the eligibility for billing. This would provide for the merchant to offer their customers a "First 500 Free" service option. The formula would be **Decode(sign(:BWCOPIES-500)-1,0,:BWCOPIES-500)**
12. Identify the **Tolerance Plus** and **Minus** figures for the counter. Tolerance is used by Oracle Service Contract's Events to determine the range within which the counter is updated.
13. Enter any desired **Comment**.
14. Click the **Formula Reference** button and the UI will pop up.
15. Define the **Formula References** you entered in the formula by selecting from the list of values the Counters defined in this Counter Group. Click OK once all References are defined.
16. Click the **Validate Formula** button. A message will display indicating if the formula is Valid or Invalid.
17. From the toolbar menu, select the **Save** icon.

Defining Time Based Counters

Time based counters are updated by a concurrent program, Time Based Counters Engine, based upon the unit of measured assigned. For example, you may wish to count the number of months since the product or service was purchased, the number of weeks since the last maintenance, etc. Use this procedure to define Time Based Counters.

Prerequisites

None

Steps

1. Navigate to **Setup**.
2. Click **Setup**.
3. Click **Counters**.
4. Click **Define Counters**.
5. Complete the **Counter Group** information
6. Create a Counter of type **Time Based**.
7. Select the **Unit of Measure** (UOM). The selected UOM should be for a measure of a unit of time; Hours, Days, Weeks, etc.
8. Select the **Usage Item** for this counter. The list of values for Usage Item is based on Master Items that have been identified as Usage Items. This flag is set in the Master Items UI on the Service tab for Serviceable Items.
 - See [Implementing Inventory](#) for more information.
9. Identify counter **Description**, **Effective** dates, and **Comments**. There are no Properties for Time Based Counters.
10. From the toolbar menu, select the Save icon.

Defining Misc. Reading Types

Use this procedure to define additional miscellaneous reading types. For example, a miscellaneous reading type could be used to record adjustments to the counter.

Prerequisites

None

Steps

1. Navigate to **Setup**.
2. Click **Setup**.
3. Click **Counters**.
4. Click **Define Misc. Reading Types**.

5. Identify the **Code, Meaning and Description** for the Misc. Reading Type. Establish the effective start and end dates. For example, to define adjustment as a miscellaneous type enter
 - Code = ADJUST
 - Meaning = Adjustment
 - Description = Counter Adjustments
6. From the toolbar menu, select the **Save** icon.

Instantiate Counters

Overview

Counters are automatically instantiated in Install Base or Contracts. When a Counter is defined and associated with that product, service or contract line a counter instance will be created automatically when a product or service is updated to the Install Base or a Contract Line is updated in Contracts.

Counters can not be manually instantiated.

For more information refer to the product documentation that will be using the counters component.

Setting Profile Options

Overview

There are no profile options for Counters

System Profile Options

Overview

There are **no** system profile options for Counters

Concurrent Programs

Overview

There is one concurrent program for Counters that is used for Time Based Counters, **Time Based Counters Engine**.