Oracle® Support

Implementation Guide

Release 11*i*

August, 2000

Part No. A86224-01

ORACLE®

Oracle Service Concepts and Procedures, Release 11*i*

Part No. A86224-01

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Implementing DMS

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Oracle Support Implementation Guide, Release 11*i*

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Preface

Welcome to **Oracle Support, Release 11*i***.

This Implementation Guide provides information and instructions to help you set up Oracle Support.

This preface explains how this 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 Service Request" provides step by step procedure for setting up the Service Request module.

“Implementing DMS” presents step by step procedure for setting up the Defect Management System.

Related Documents

For more information, see the following manuals:

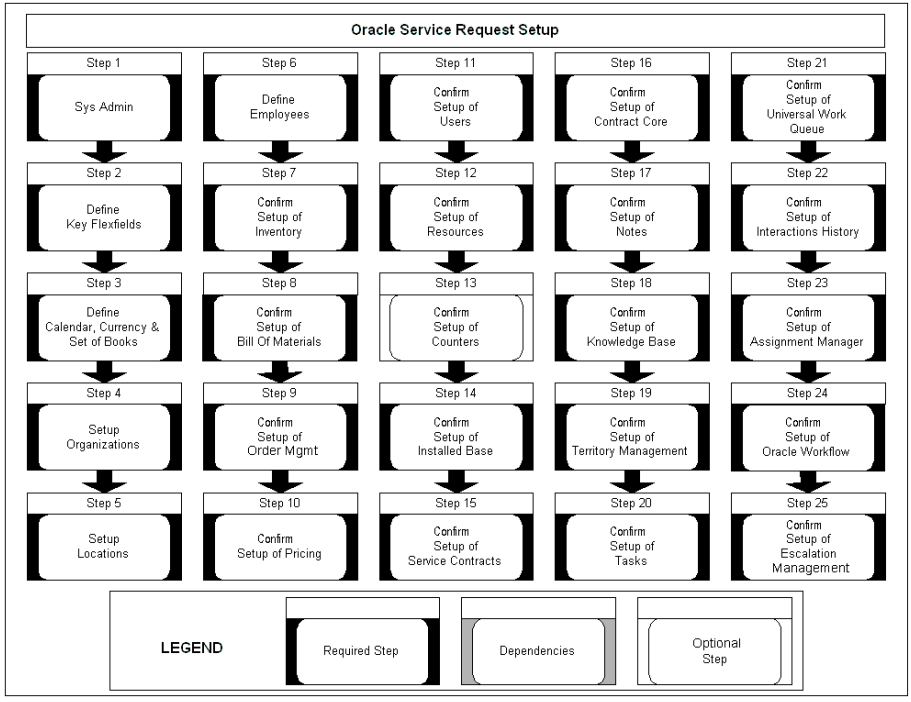
- Oracle Service Implementation Guide
- Oracle Service Concepts and Procedures Guide
- Oracle Customer Care Concepts and Procedures Guide
- Oracle Customer Care Implementation Guide
- Oracle Support Concepts and Procedures Guide

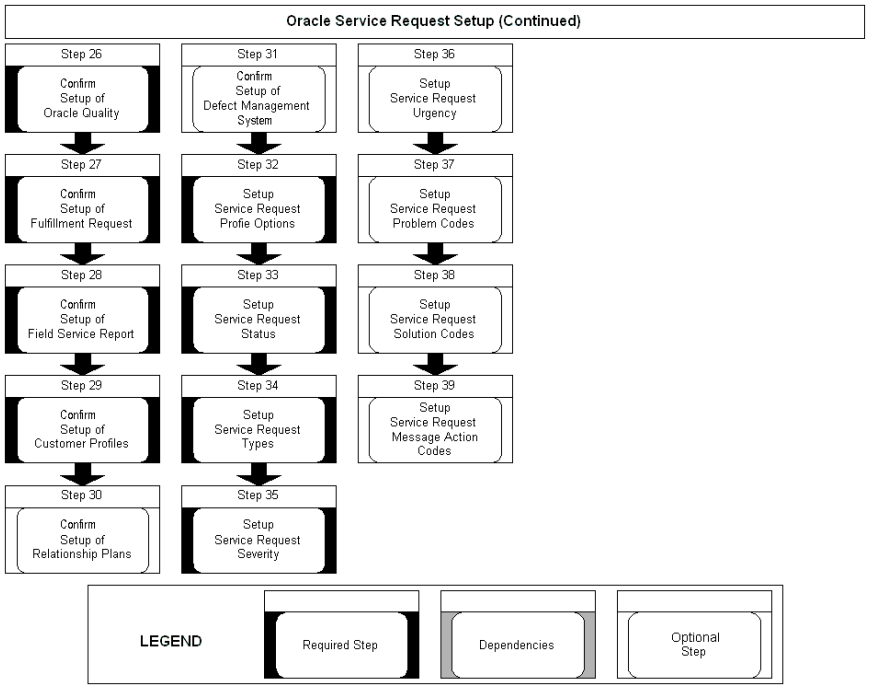
Implementing Service Requests

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

Setup Flowchart

This flowchart shows a recommended order for implementing service requests.





Setup Steps

Step No.	Required?	Setup Step Description
Step1	Required	Confirm: Setup System Administration See: Oracle Applications Systems Administrator User's Guide
Step 2	Required	Confirm: Setup Key Flexfields See: Oracle Applications Flexfields Guide
Step 3	Required	Confirm: Setup Calendar Confirm: Setup Currency Confirm: Setup of Sets of Books See: Oracle General Ledger's User's guide See: Multiple Organizations in Oracle Applications

Step No.	Required?	Setup Step Description
Step 4	Required	Confirm: Setup Organizations See: Implementing Oracle HRMS and Oracle Inventory User's Guides
Step 5	Required	Confirm: Setup Locations See: Implementing Oracle HRMS
Step 6	Required	Confirm: Define Employees See: Implementing Oracle HRMS See: Implementing Oracle CRM Foundation, Resources Service Requests must be owned to Resources. A Resource can be an Employee defined in HRMS and imported into CRM Foundation Resources.
Step 7	Required	Confirm: Setup Inventory (Inventory Items, Unit of Measures) See: Oracle Inventory User's Guides One Inventory Item can be identified in a Service Requests. Units of Measure are used for Service Requests Charges.
Step 8	Required	Confirm: Bills of Materials Setup See: Oracle Bills of Materials User's Guide
Step 9	Required	Confirm: Setup Order Management (Transaction Types, Taxes codes, Pricing) See: Oracle Order Management User's Guide This step is required for Service Request Charges.
Step 10	Required	Confirm: Setup Pricing See: Oracle Pricing User's Guide This step is required for Service Request Charges.
Step 11	Required	Confirm: Setup Users See: Oracle Applications System Administrator's Guide
Step 12	Required	Confirm: Setup Resources See: Implementing Oracle CRM Foundation, Resources Service Requests must be owned by a Resource. A Resource can be an Employee. Resources can be associated with Application Users.
Step 13	Optional	Confirm: Setup Counters See: Implementing Oracle CRM Service Core, Counters Counters are used to track Inventory Items and Contract Lines. Counters are updated from the Service Requests.

Step No.	Required?	Setup Step Description
Step 14	Required	Confirm: Setup Installed Base See: Implementing Oracle CRM Service Core, Installed Base Service Requests can optionally track Installed Base Items instead of Inventory Items. Installed Base Items belong to specific Customers.
Step 15	Required	Confirm: Setup Service Contracts and Contracts Core See: Implementing Oracle Service Contracts See: Implementing Oracle Contracts Core Service Request entitlement coverage can be done using Service Contracts. Contracts Core is required for Service Contracts.
Step 16	Required	Confirm: Setup Charges See: Implementing Oracle CRM Service Core, Charges Service Requests can capture Charges to be billed to the Customer.
Step 17	Required	Confirm: Setup Notes See: Implementing Oracle CRM Foundation, Notes Notes are used to track activity in the Service Requests, Track Knowledge Management information, track Escalation activity and track information regarding Customer Interactions. Note Types are required for Knowledge Management. One Note Type is required as a system profile option for general Service Request updates.
Step 18	Required	Confirm: Setup Knowledge Base See: Implementing Oracle CRM Service Core, Knowledge Base Service Request users can search, score and contribute to the Knowledge Management system.
Step 19	Required	Confirm: Setup Territory Management See: Implementing Oracle CRM Foundation, Territories Service Request ownership and Task ownership and assignment can be achieved with the Assignment Manager using established Territories It is recommended that you use the Territory Administrator's Responsibility for this Setup.
Step 20	Required	Confirm: Setup Tasks See: Implementing Oracle CRM Foundation, Tasks Service Request can track and manage required work using Tasks. Resources can track and manage non-Service Request work using Tasks.

Step No.	Required?	Setup Step Description
Step 21	Required	Confirm: Setup Universal Work Queue See: Implementing Oracle Universal Work Queue Users can view and select all owned Service Requests, Task, and Escalations with the Universal Work Queue. Users can receive inbound calls and email from the Universal Work Queue.
Step 22	Required	Confirm: Setup Interaction History See: Implementing Oracle CRM Foundation, Interaction History Service Request can track and view Customer Interactions.
Step 23	Required	Confirm: Setup Assignment Manager See: Implementing Oracle CRM Foundation, Assignment Manager Service Requests, Tasks and Escalations Resource ownership can be identified using the Assignment Manager. Tasks can have multiple assignees identified by the Assignment Manager.
Step 24	Required	Confirm: Setup Oracle Workflow See: Implementing Oracle Workflow Service Requests can start Workflow processes based on Task Type. Task and can start Workflow processes to notify Resource assignments. Escalations can start Workflow processes to notify Resource assignment and Escalation progress notification updates.
Step 25	Required	Confirm: Setup Escalation Management See: Implementing Oracle CRM Foundation, Escalation Management Service Requests, Task and Defects can be escalated using the Escalation Manager. Escalation notifications can be driven by configured rules.
Step 26	Required	Confirm: Setup Oracle Quality See: Oracle Quality User's Guide Service Requests can track configured Quality information.
Step 27	Required	Confirm: Setup Fulfillment See: Implementing Oracle CRM Foundation, 1-to-1 Fulfillment Request Service Request reports can be sent by email and fax using Fulfillment.

Step No.	Required?	Setup Step Description
Step 28	Required	Confirm: Setup Field Service Report See: Implementing Oracle Field Service Service Request debriefing information can be tracked using the Field Service Report.
Step 29	Required	Confirm: Setup Customer Profiles See: Implementing Oracle Customer Care Customer Profile information can be viewed in the Service Request.
Step 30	Optional	Confirm: Setup Relationship Plans See: Implementing Oracle Customer Care Service Request can execute Relationship Plans.
Step 31	Optional	Confirm: Setup Defect Management System See: Implementing Oracle Support Service Request can create and track Defects.
Step 32	Required	Setup Service Request Profile Options See: Implementing Oracle Support
Step 33	Required	Setup Service Request Status See: Implementing Oracle Support Service Request resolution progressing can be tracked and rules enforced using Statuses.
Step 34	Required	Setup Service Request Type See: Implementing Oracle Support Service Requests can be identified by a Types and enforce rules and start Workflows.
Step 35	Required	Setup Service Request Severity See: Implementing Oracle Support Service Request can identify the User's view of Severity and enforce rules.
Step 36	Optional	Setup Service Request Urgency See: Implementing Oracle Support Service Request can identify the Customer's view of the business Urgency, enforce rules and allow updates by iSupport.

Step No.	Required?	Setup Step Description
Step 37	Optional	Setup Service Request Problem Code See: Implementing Oracle Support Service Requests can identify a configured Problem Code.
Step 38	Optional	Setup Service Request Solution Code See: Implementing Oracle Support Service Requests can identify a configured Solution Code.
Step 39	Optional	Setup Service Request Message Action Codes See: Implementing Oracle Support Users can send messages to other Users from the Service Request.

Additional Documents

The following can be helpful during the implementation process:

- Implementing Oracle CRM: ERP Functional Checklist
- Oracle Process Manufacturing Inventory Management User's Guide

Setting Up Service Requests

You can define any number of service request types, statuses, urgency codes, severity codes, problem codes, resolution codes and message actions.

Setting Service Request Status

You can define service request statuses to indicate the current state of reported service requests. For example, a customer calls to report a broken switch on his personal computer. Once the service request is created, you could set the service request status to Open.

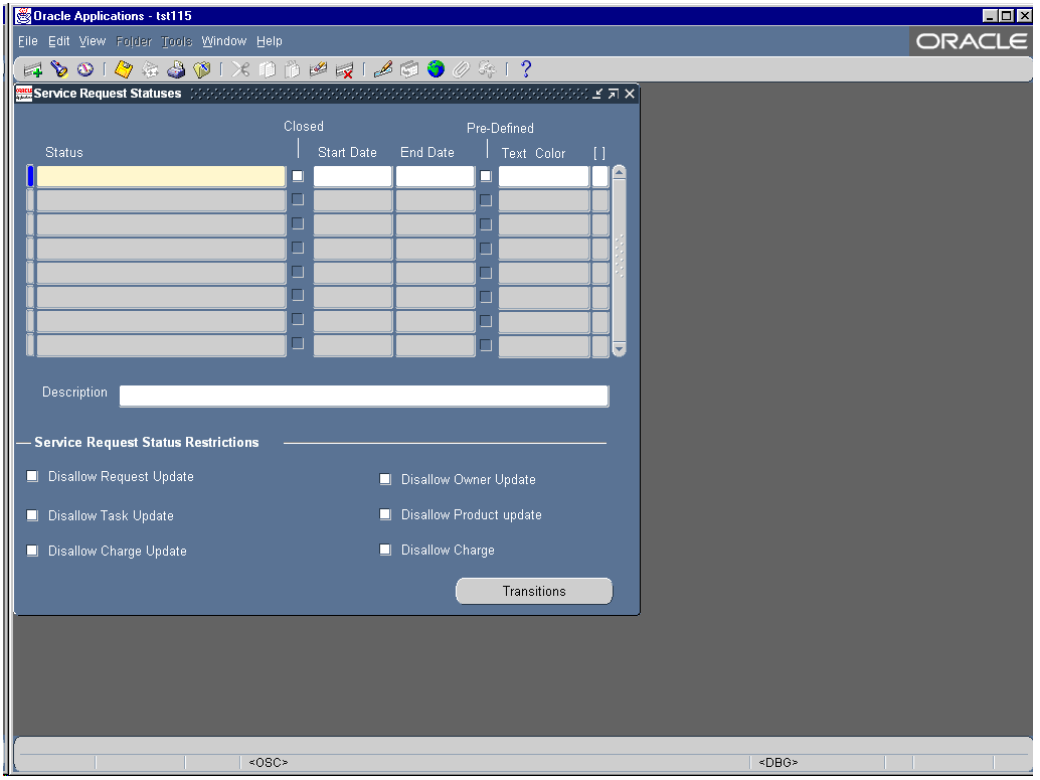
You can set up state transition rules and associate a rule with a user responsibility. This allows the system administrator to create different business processes for different sets of users by managing the service request transition from one status to another. For example, a system administrator could setup a special business process for ensuring that all service requests get approval from the customer before closure. The transition rule would be that the users can only change the status of the service request from' Open to Working', from' Open to Pending Approval', from 'Working to Pending Approval' and from' Pending Approval to Closed'.

Prerequisites

Appropriate user responsibilities need to be defined before you can associate a state transition rule with a user responsibility. All status must be defined before you can include them in the state transition rule.

To set service request status for your users:

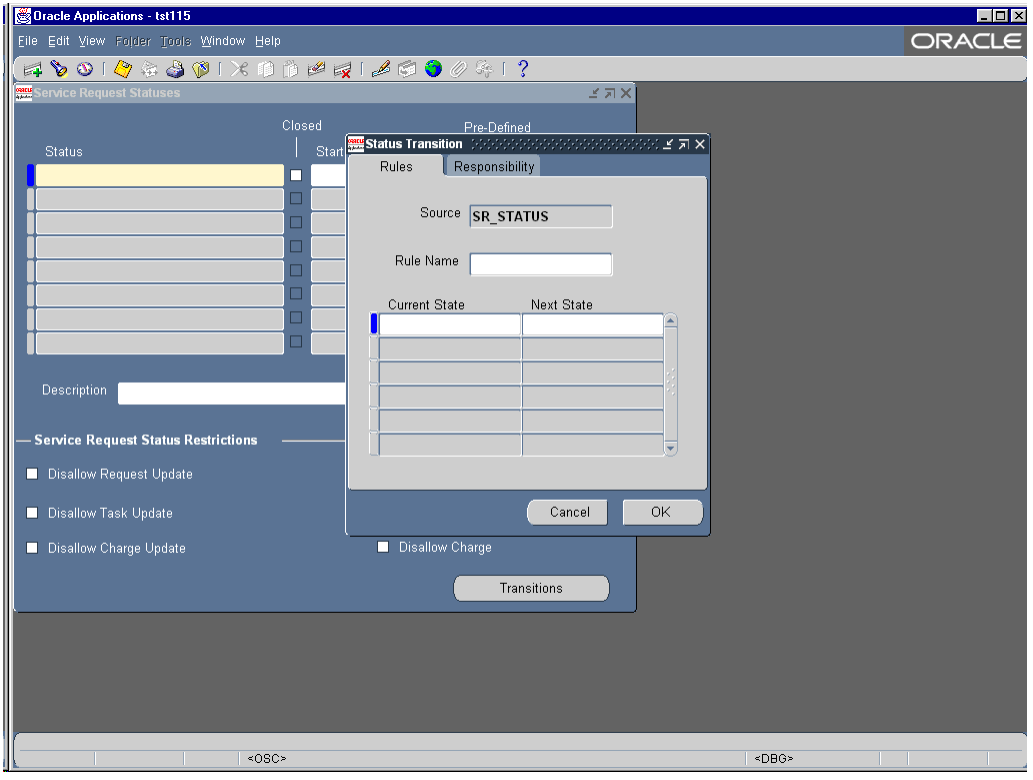
1. Navigate to the Service Request Statuses window.
2. Define a Status name. If a status is predefined, the predefined checkbox will be checked. The seeded status are Open and Closed.



3. If the status name means closed, then select the Closed checkbox.
4. If you want to determine the text color of your status, then select from the list of colors in the Text Color field.

5. Enter a brief Description of the status.
6. Optionally, check the Service Request Status Restriction checkboxes as per the business rules of your organization.

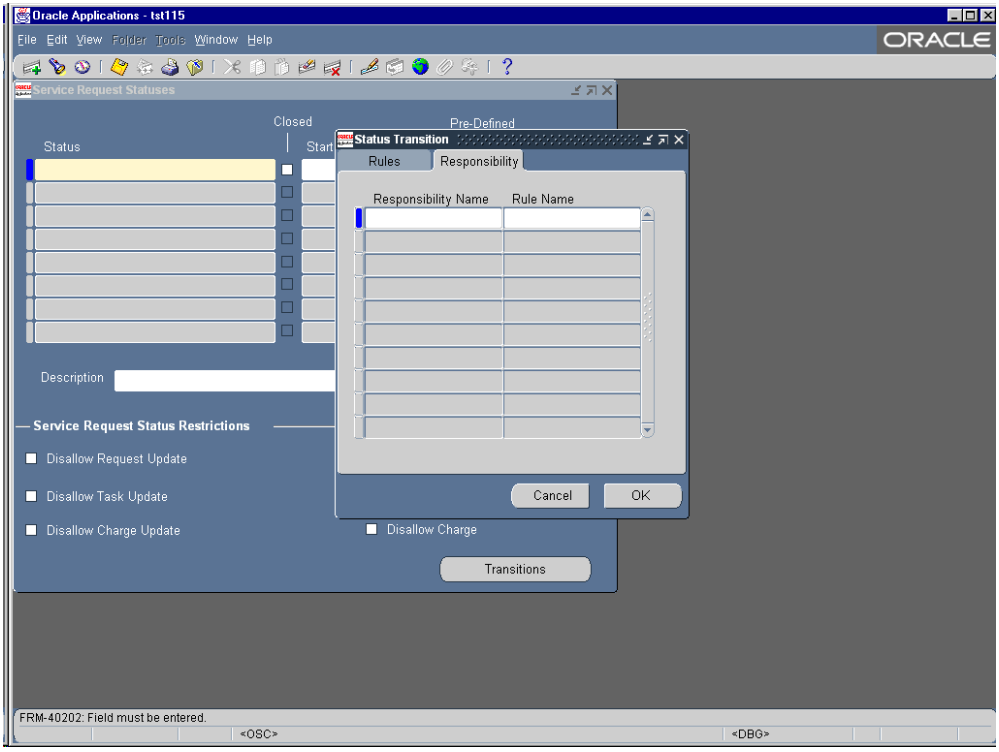
   For a detailed description of status restriction checkboxes, see the Service Request Status Restriction Checkboxes table in the References section.
7. Click Transitions to define state transition of the statuses. It determines the progress of a service request through the various statuses as defined in the user privilege for each status type.The State Transition window opens.



8. In the Rules tab, the source defaults to Service Request Status. Enter a name for the rule in the Rule Name field.
9. Select from the list of values in the Current State and Next State fields.

Use the current state and next state values to define transition from one status to another. For example, current state of Open to next state of Working.

10. Select a responsibility from the Responsibility Name field. Select the rule name in the Rule Name field and click OK.



Now this transition rule has been associated with the chosen responsibility status.

11. Save your service request status and the associated state transition rule.

References

Setting Service Request Type

Service Request Status Restriction Checkboxes

Checkbox	Restriction associated with Status
Disallow Request Update	does not allow service request update after creation. Only the service request status field can be updated
Disallow Task Update	does not allow task update after creation
Disallow Charge Update	does not allow charge update after creation
Disallow Owner Update	does not allow a change of Owner after creation
Disallow Product Update	does not allow the update of the selected product after creation
Disallow Charge	does not allow creation of a charge line for a service request

Setting Service Request Type

You can define service request types to categorize your service requests. For each service request type, you can set up the related service request status that corresponds with each service request type. Each type can be linked to an Oracle Workflow process that can be automatically launched when the service request is created (not when it is updated) or launched manually in the service request screen.

You can also associate a service request type with a transaction group. Transaction groups are defined in Installed Base under transaction billing type and are used in generating charges for service requests.

Following are some examples of service request types that you can create:

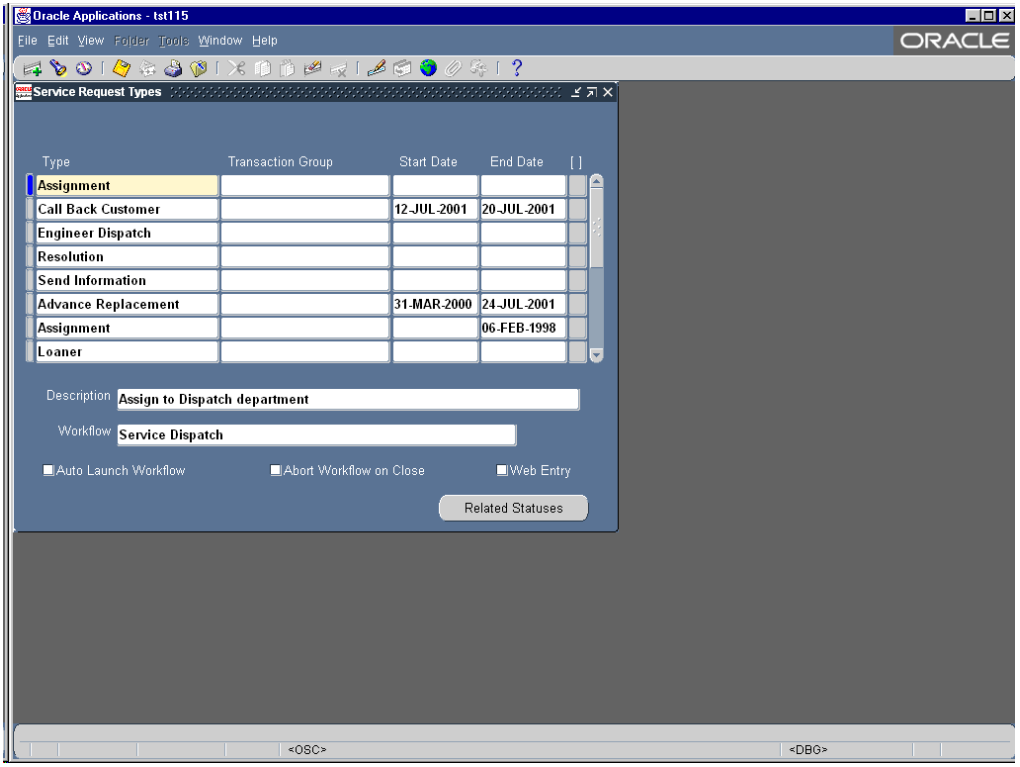
- Request for Information
- Customer Complaint
- Installation Request
- Preventive Maintenance Visit
- Helpdesk
- Technical Problem

Prerequisites

- Before selecting the related status for the service request type, you must define the service request status.
- The transaction groups need to be defined if you want to associate a service request type with a transaction group.
- The workflow needs to be defined in Oracle workflow before you can associate a workflow with a service request type

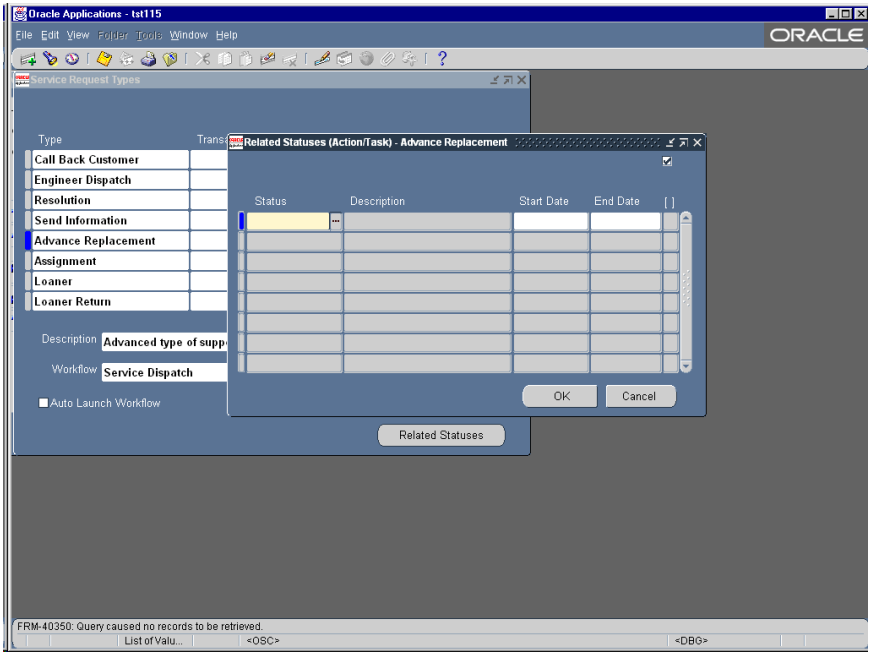
To set service request types and their related statuses for your users:

1. Navigate to Service Request Types window.
2. Define a Type name and enter it in the Type field.



3. Select a Transaction Group from the Transaction Group field. Transaction Groups are used for Charges and are defined in Installed Base under Transaction Billing Types.
4. Enter the effective dates for the service request type in the Start Date and End Date fields.
5. Enter a brief Description of the service request type.
6. You can associate a workflow with each service request type by selecting a workflow in the Workflow field.
7. Optionally, select from the available check boxes (Auto Launch workflow, Abort workflow on close and web entry).

   For a detailed description of service request type check boxes, see the Service Request Type Checkboxes table.
8. Click Related Statuses button to define the status options for the selected service request type. This will determine the list of available statuses to show the user in the list of values for the service request status. The Related Statuses window opens.



9. Select from the list of values in the Status field. The description of the status is displayed.
10. Enter the effective dates in the Start Date and End Date fields and click OK.
11. Save your service request type.

    The new type and related statuses register as lists of values for their fields in Service Requests.

References

Setting Service Request Status

Service Request Type Check Boxes

Check Box	Action
Auto Launch Workflow	Launches workflow automatically upon service request create
Abort Workflow on Close	Aborts workflow when service request status is closed
Web Entry	Defines that this service request type is accessible for entry from the web with Oracle iSupport

Setting Service Request Severity

You can define a service request's severity and thereby set the priority. Low, Medium, and High are examples of severities.

A service request severity reflects the support person's perception of the reported service request.

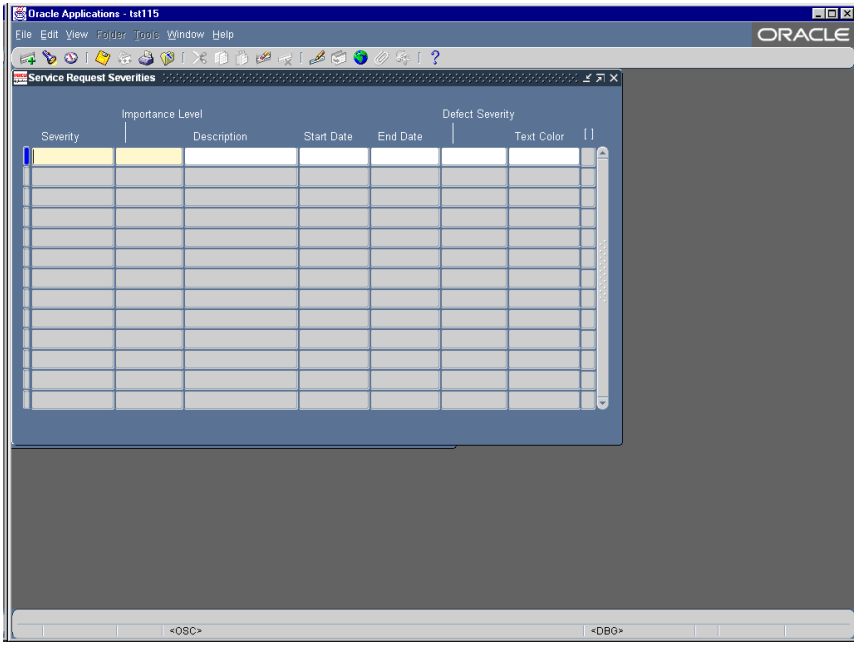
Prerequisites

Defect severity needs to be defined if you want to associate a service request severity with the defect severity. When a defect is created from a service request, the create defect window will default the defect severity defined with this service request severity.

To determine service request severity for your users:

1. Navigate to Service Request Severities window.
2. Enter a Severity name in the severity field.

3. Enter a numerical value in the Importance Level field. The importance level indicates the importance of this particular severity with respect to other defined severities.



4. Enter a brief Description of the severity.

5. Enter the effective dates in the Start Date and End Date fields.

6. Select a Defect Severity.

   When creating defects from a service request, the defect severity field defaults to the defect severity value associated with the service request severity you define in this form.

7. Select a text color in the Text Color field. The severity will be shown in this text color on the service request window.

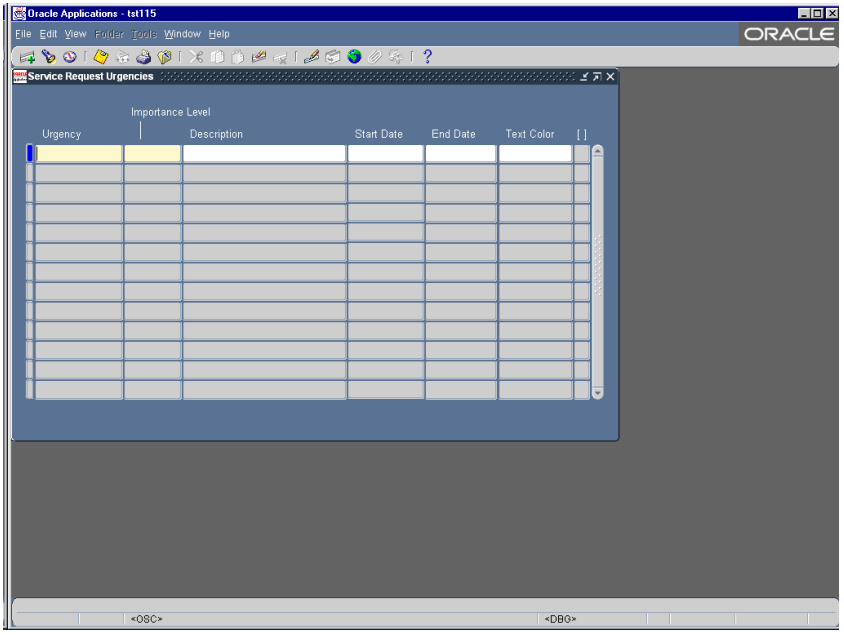
8. Save the service request severity.

Setting Service Request Urgency

A service request urgency reflects the customer's perception of the reported service request. The service request urgencies are user definable. Low, Medium, and High are examples of urgencies.

To determine service request urgency for your users:

1. Navigate to the Service Request Urgencies window.
2. Define an Urgency name.



3. Enter a numerical value in the Importance Level field.The importance level indicates the importance of this particular urgency with respect to other defined urgencies.
4. Enter a brief Description of the urgency value.
5. Enter the effective dates in the Start Date and End Date fields.
6. Select a text color in the Text Color field. The urgency will be shown in this text color on the service request window.
7. Save the service request urgency.

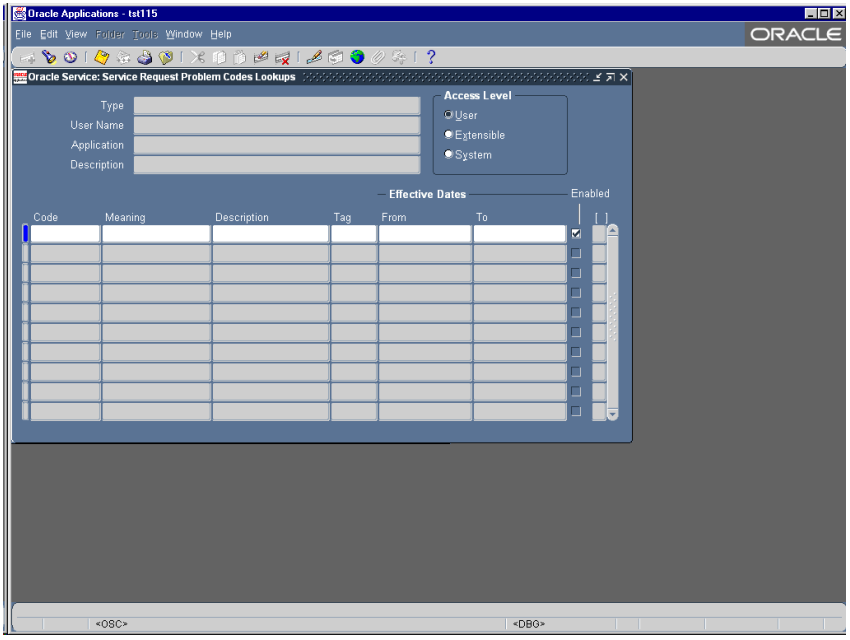
Setting Service Request Problem Code

A problem code gives meaning to the service request described by the requester. Problem codes isolate the detailed reason for the request. For example, a customer reports a problem with a stereo receiver. Every time they turn it on, it blows the circuit breaker. A problem code of ES, for Electrical Short, is assigned.

A problem code can be entered on the workbench tab of the service request.

To set a service request problem code:

1. Navigate to the Service Request Problem Codes lookup window. The type field and user name will show REQUEST_PROBLEM_CODE and Service Request Problem codes respectively. The description will show Service Request Problem codes for service request form. It also displays any problem codes which have been defined earlier.
2. Enter a problem code in the Code field.



3. Enter a Meaning. A meaning is a brief description of the code.
4. Enter a full Description of the code.

5. Enter the effective dates in the From and To fields.
6. Select the Enabled checkbox to make the code available for use.
7. Optionally, enter the flexfield, if defined.
8. Save the problem code

References

Creating Service Requests in the Oracle Support Concepts and Procedures Guide

Setting Service Request Solution Code

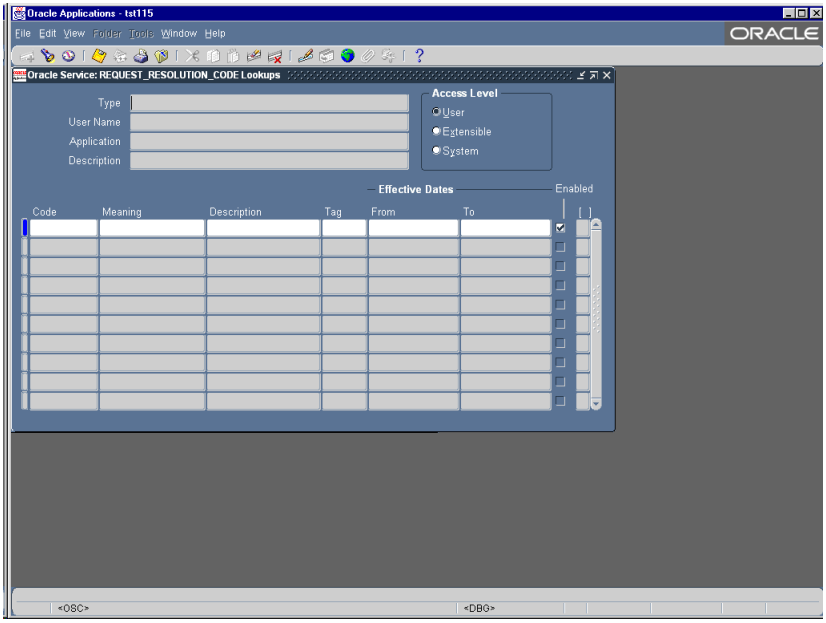
A solution code specifies a code to the resolution of the service request.

For example, a customer reports a problem with a stereo receiver. Every time they turn it on, it blows the circuit breaker. A problem code of ES, for Electrical Short, is assigned. After careful analysis, a resolution code of RCB with a meaning of Replace Circuit board is assigned.

In the workbench tab of the service request, a user can select a resolution code that resolves the customer problem.

To set a service request solution code:

1. Navigate to the Service Request Solution Codes lookup window. The type field and user name will show REQUEST_RESOLUTION_CODE and Service Request Solution codes respectively. The description will show Service Request solution codes for service request form. It also displays any solution codes which have been defined earlier.
2. Enter a solution code in the Code field. A solution code is a brief representation of the problem.
3. Enter a Meaning. A meaning is a brief description of the code.
4. Enter a full Description of the code.
5. Enter the effective dates in the From and To fields.
6. Select the Enabled checkbox to make the code available for use.



7. Optionally, enter the flexfield, if defined.
8. Save the solution code

References

Creating Service Requests in the Oracle Support Concepts and Procedures Guide

Setting Message Action Codes

You can use message action codes to specify an action you want a message recipient to take.

The messages can be sent from the service request by getting to the messages window. To open this window, Select Messages option from the Tools menu.

To setup a message action code:

1. Navigate to the Message Action Request quick codes Codes window. The type field and description will show MESSAGE_ACTION_REQUEST and action request types used when sending messages
2. Enter a message action code in the Code field.

3. Enter a Meaning. A meaning is a brief description of the code.
4. Enter a full Description of the code.
5. Enter the effective dates in the From and To fields.
6. Select the Enabled checkbox to make the code available for use.
7. Save the message action request code

References

Creating Service Requests in the Oracle Support Concepts and Procedures Guide

Setting Service Requests Profile Options

In this step, you assign profile check groups to an application, responsibility or user. Service Requests has been seeded with several user profile options.

These profile option settings determine the default values that appear for the Service Request.

Profile Options	User	System Administration				Requirements	
	User	User	Resp.	App	Site	Required	Default Value
Service :Item Flexfield (Service) This value determines the Oracle Inventory key flexfield structure you want to use when displaying support services. This value is mandatory.				X	X	YES	
Service:Item Flexfield (Product) This value determines the Oracle Inventory key flexfield structure you want to use when displaying support services. This value is mandatory; without it the system will be unable to display the product number. It is recommended that you set this profile to MSTK				X	X	YES	
Service:Auto Launch Workflow This determines whether a workflow launches automatically when you save a service request	X			X	X		

Service: Default Service Request Type	X			X	X		
Service: Default Service Request Severity	X			X	X		
Service: Default Service Request Urgency	X			X	X		
Service: Default Service Request Owner	X			X	X		
Service: Day Unit of Measure This profile option is used to set the default value for Unit of measure representing the day	X			X	X	YES	
Service: Default Knowledge base solution type	X	X	X	X	X	YES	
Service: Default New note type in Workbench Tab		X	X	X	X		
Service: Allow knowledge note update This profile option is used to indicate if the knowledge notes can be updated		X	X	X	X		
Service: Service Request default tab This profile option is used to set the default tab for Service Request; Product Coverage, Workbench, Log, Interactions, Contacts, Related Documents, Tasks	X	X	X	X	X		
Service: Visual attribute for setting color escalated Service Request Number	X	X	X	X	X		
Service: Default web Service Request Owner	X			X	X		
Service: Default web Service Request Severity	X			X	X		
Service: Default web Service Request type	X			X	X		
Service: Default web Service Request Urgency	X			X	X		
Customer Care: Default outcome for interactions	X	X	X	X	X		
Customer Care: Default results for interactions	X	X	X	X	X		
Customer Care: Default reasons for interactions	X	X	X	X	X		

Task Manager: Default task Status	X	X	X	X	X		
Task Manager: Default task Type	X	X	X	X	X		
Task Manager: Default task Priority	X	X	X	X	X		
Client Time zone This profile option sets the default in the service request header for your hardware client time zone.	X	X	X	X	X	YES	
Server Time zone This profile option sets the default in the service request header for your hardware server time zone.	X				X	YES	
Service: Knowledge Base URL						YES	

To set the Service Requests profile options:

1. Change your responsibility to System Administrator.
2. Navigate to the Find System Profile Values window. Choose Profile—> System.
3. Setup the profile options indicated.
4. Search for a specific profile and set the profile value at site, application, responsibility, or user levels.

Setting Automated Escalations Rules for Service Requests

Customer escalations are situations that occur that require swift action, additional resources and special management. Typically a customer escalation starts with a Customer call. During the call, the customer will express a high level of dissatisfaction related to a host of problems.

Escalations are not only painful to the customer but to the merchant as well. The customer is typically suffering a financial loss and the merchant is losing not only current profitability but future revenue as well. Customer dissatisfaction will drive down customer loyalty and retention and can permanently damage a merchant's business.

Automated Escalations will enable prevention of these volatile reactive customer escalation situations. A merchant will be able to define specific situations they wish to prevent, automatically monitor for these types situations, receive proactive notifications and take swift actions to prevent possibly damaging situations.

Automated escalations are system produced notifications and Task creations and assignments that are designed to prevent customer escalation situations. The automated escalations are directed by a configured business rules as related to their services. These may be related to service level guidelines, service agreements or other business rules governing the service operation.

A Service Request is an ideal object to monitor for specific business rule violations. Service Requests escalations can be prevented by proactively identifying situations that are at risk of requiring Escalation Management.

The Business Rule administrator is a tool used to setup Service Requests Automated Escalations. The Business Rule Workbench is used to define the specific situations, conditions for detecting the situations and specific actions to take if a critical situation is detected. Specific actions are provided to send Notifications or create Tasks. Additional actions can be configured using Oracle Workflow. The Business Rule Monitor is a Oracle Workflow process that runs in the background, as a Concurrent Program, to monitor, detect and process Automated Escalations.

Prerequisites

Service Requests exist and confirm setup of Oracle Workflow and Business Rule administrator.

To set automated escalation rules:

1. Navigate to the menu.
2. Click Manage Escalations.
3. Click Automated Escalations.
4. Click Business Rule Workbench. The Business Rule Workbench window opens.
5. Define the business rule condition to monitor. Select Service Request for the list of values for the business rule Object. (See: Implementing Escalation Management for detailed information on the business rule definitions.)
6. Click Save.
7. Click Validate to check the Rule Definition syntax.
8. Click Generate to create the dynamic view that is used in the monitoring process. Only Rules that validate will generate the required views.
9. Close the window.
10. Navigate to the Business Rule Monitor window.

11. Click Start.

    If the Business Rule Monitor concurrent process is running then the Start button will be labeled 'Stop'. You do not need to Stop and Start the monitor for new or modified rules to be included in the monitoring process. New and modified rules will be included in the monitor's next processing cycles as defined on the Business Rule Monitor window.

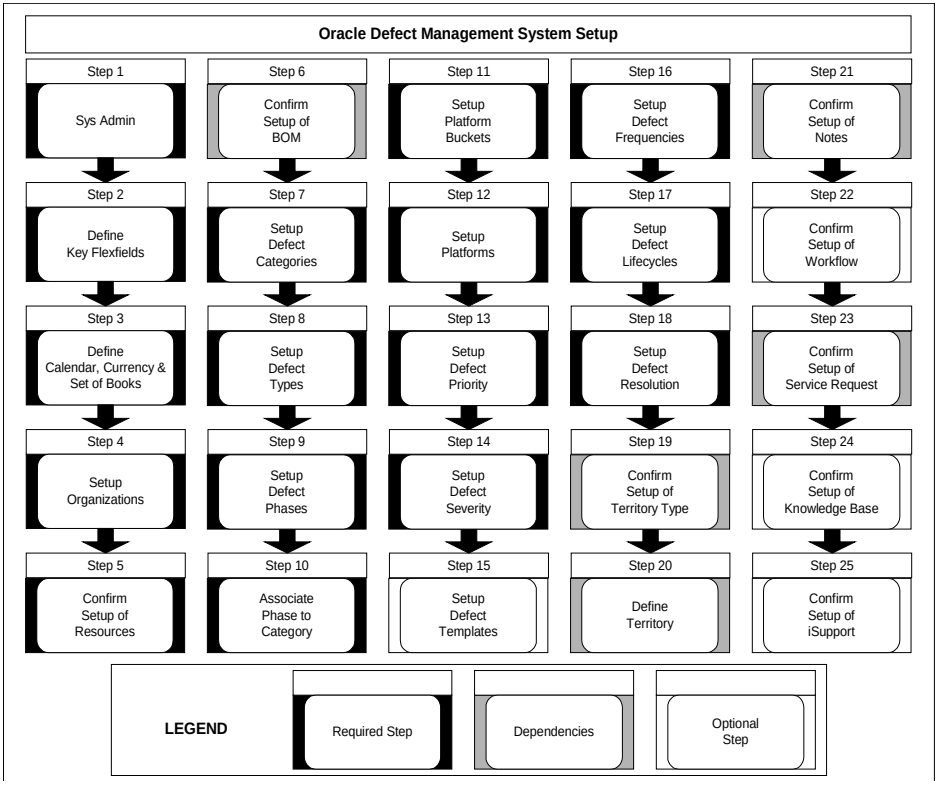
References:

- Implementing Oracle CRM Foundation, Escalation Management.
- Oracle Workflow documentation.
- Oracle Support Concepts and Procedures Guide.

Implementing DMS

Setup Flowchart

While you can set up the Defect Management System in many different ways, the following flowchart shows the order we recommend.



Setup Checklist

Complete the following steps in the order they are shown.

Step No.	Required	Step Title
Step 1	Yes	Sys Admin
Step 2	Yes	Define Key Flexfields
Step 3	Yes	Define Calendar, Currency & Set of Books
Step 4	Yes	Setup Organizations
Step 5	Yes	Confirm setup of Resources
Step 6	Dependency	Confirm setup of BOM
Step 7	Yes	Setup Defect Categories
Step 8	Yes	Setup Defect Types
Step 9	Yes	Setup Defect Phases
Step 10	Yes	Associate Phases to Categories
Step 11	Yes	Setup Platform Buckets
Step 12	Yes	Setup Platforms
Step 13	Yes	Setup Defect Priority
Step 14	Yes	Setup Defect Severity
Step 15	Optional	Setup Defect Templates
Step 16	Yes	Setup Defect Frequencies
Step 17	Yes	Setup Defect Lifecycles
Step 18	Yes	Setup Defect Resolution
Step 19	Dependency	Confirm Setup of Territory Type
Step 20	Dependency	Define Territory
Step 21	Dependency	Confirm Setup of Notes
Step 22	Optional	Confirm Setup of Workflow
Step 23	Dependency	Confirm Setup of Service Request
Step 24	Optional	Confirm Setup of Knowledge Base
Step 25	Optional	Confirm Setup of iSupport

Setup Steps

The following is a chronological list of setup steps designed to guide the user in setting up the Defect and Enhancement Management System and all other related component setups.

Step 1 Creating an HR employee with correct responsibility.

1. Log on to Webforms.
2. Responsibility: Human Resources.
3. Navigation: People / Enter & Maintain.
4. Enter the First and Last Name.
5. Select 'Employee' in the Type field.
6. Enter the Social Security number and employee birth date.

Step 2 Creating an FND user with password.

1. Log on to Webforms.
2. Responsibility: System Administrator.
3. Navigation: Security / User / Define.
4. Enter the desired Username and Password.
5. Choose the person defined in step 1.
6. Select the designated DEMS responsibilities: DMS Regular User, DMS System Administrator, or DMS Product Administrator.

Step 3 Importing the HR employee as a resource.

1. Log on to Webforms.
2. Responsibility: Customer Support.
3. Navigation: Resource Management / Maintain Resources / Import Resources.
4. Enter the employee name or number - Press 'Search'.
5. Select those employees you wish to import.
6. Click on the Create Resource button.
7. Click on 'OK'.
8. Save to commit the changes.

Step 4 Determining the Responsibility ID.

1. Log on to Webforms.
2. Responsibility: System Administrator.
3. Navigation: Security / Responsibility / Define.
4. Query up the Responsibility name (DMS Regular User).
5. Menu Help / Diagnostics / Examine.
6. Change field name responsibility_name to responsibility_id and hit tab.
7. Note down the responsibility_id value.

Step 5 Setting Up the User Profile.

1. Log on to Webforms.
2. Responsibility: System Administrator.
3. Navigation: Profile / System.
4. Enter the user name you've imported from HR.
5. Select the following profiles and enter as follows:
6. JTF_PROFILE_DEFAULT_APPLICATION: 514.
7. JTF_PROFILE_DEFAULT_LANGUAGE: Default Language code for the user.
8. JTF_PROFILE_DEFAULT_CHARSET: Default Charset for the user.
9. JTF_PROFILE_DEFAULT_RESPONSIBILITY: Default responsibility.

Step 6 Assigning Roles to a Resource.

1. Log on to the Admin Console (HTML).
2. Responsibility: Application Developer.
3. Search for the user wish to assign a role to.
4. Select the user.
5. Assign the appropriate role (e.g. css_def_defect_user).
6. Repeat the same process until all resources are assigned roles.

Step 7 Creating Product and Component Items.

1. Log on to Webforms.
2. Responsibility: Manufacturing.
3. Navigation: Inventory / Items / Master Items.
4. Select the Inventory operating unit.
5. Enter the Inventory Item name.
6. Enter the Inventory Description.
7. Enable 'BOM Allowed' from the Bills of Material Tab.
8. Enable Defect Tracking from the Service Tab.
9. From the menu, select Tools / Organization Assignment and assign to all Orgs.

Step 8 Creating Product and Component version numbers.

1. Log on to Webforms.
2. Responsibility: Manufacturing.
3. Navigation: Inventory / Items / Master Items.
4. From the menu, select Tools / Revisions.
5. Enter in a unique revision.
6. Enter the product version in the description field.
7. Inventory Orgs for DMS: ASO_PRODUCT_ORGANIZATION_ID.
8. Enter in a valid effective date.

Step 9 Linking Components to Products.

1. Log on to Webforms.
2. Responsibility: Manufacturing.
3. Navigation: Bill of Materials / Bills / Bills.
4. Select a product from the Item LOV.
5. Select a component from the Component LOV.
6. Save to commit the link.
7. Repeat the same process to link sub-components to components.

Step 10 Creating a Defect Category.

1. Log on to the Admin Console (HTML).
2. Responsibility: DMS System Administrator.
3. Tab: Process / Category.
4. Enter in a new Category.
5. Press the Update button to commit the addition.
6. Recommendation: Do not add a new Category, this functionality may not be supported in future releases.

Step 11 Creating an associated Type.

1. Click on the new Category hyperlink you created in step 10.
2. Enter in the Category's description.
3. Enter in the associated Types.
4. Press the Update button to commit the addition.

Step 12 Creating a Phase.

1. Log on to the Admin Console (HTML).
2. Responsibility: DMS System Administrator.
3. Tab: Process / Phases.
4. Enter in a new Phase and Phase Code.
5. Press the Update button to commit the addition.

Step 13 Creating and associating a Status.

1. Click on the new Phase hyperlink.
2. Enter in the Phase Description.
3. Enter in a new Status and Status Code.
4. Press the Update button to commit the addition.
5. Select the new Status hyperlink.
6. Enter in the Status description.
7. Enter in the Status attribute and Press the Update button.

Step 14 Associating Phases to Type.

1. Log on to the Admin Console (HTML).
2. Responsibility: DMS System Administrator.
3. Recommendation: A Category should have the same Phases regardless of Type.
4. Tab: Process / Category.
5. Select the desired Category hyperlink.
6. Select the desired Type hyperlink.
7. Select the default Phase.
8. Press the Phase Name 'GO' button and select the appropriate Phases
9. Auto assign flag indicates if a phase change should invoke the assignment engine.
10. Development owner flag indicates if the owner of this phase is the development contact.
11. Primary contact flag indicates if the phase should change ownership to the primary contact.

Step 15 Creating Platform Buckets.

1. Log on to the Admin Console (HTML).
2. Responsibility: DMS System Administrator.
3. Tab: Platform / Platform Buckets.
4. Enter a platform bucket name.
5. Enter a platform bucket description and click 'Update' to commit the addition.

Step 16 Creating Platforms.

1. Log on to the Admin Console (HTML).
2. Responsibility: DMS System Administrator.
3. Tab: Platform / Platforms.
4. Enter the platform names.
5. Enter the platform codes for each platform you wish to create.
6. Click on the 'Update' button to commit the addition.

Step 17 Creating Platform Details and Versions.

1. Select the chosen platform.
2. Enter a platform description.
3. Enter platform versions.
4. Select the platform bucket for the specified platform.
5. Click on the 'Update' button to commit the addition.

Step 18 Recording all error codes for a given product.

1. Log on to the Admin Console (HTML).
2. Responsibility: DMS System Administrator.
3. Tab: Product / Error Codes.
4. Select a product from the list item provided by clicking the 'GO!' button.
5. Enter all possible error codes and descriptions related to this product.
6. Click on the 'Update' button to commit the addition.
7. Comment: This may be removed in future releases.

Step 19 Designating Product version support against Platform versions.

1. Log on to the Admin Console (HTML).
2. Responsibility: DMS System Administrator.
3. Tab: Product / Supported Platforms.
4. Select a product from the list item provided by clicking the 'GO!' button.
5. Select a product version from the list item provided by clicking the 'GO!' button.
6. Select all the product platforms from Platform 'GO!'.
7. Select all supported platform versions from Platform version 'GO!'.
8. Specify the lifecycle of the platform version / product version combination.
9. Click on the 'Update' button to commit the addition.

Step 20 Creating Defect Priorities.

1. Log on to the Admin Console (HTML).
2. Responsibility: DMS System Administrator.
3. Tab: Miscellaneous / Priorities.
4. Enter the Priority sort order.
5. Enter the Priority code.
6. Enter the Priority name.
7. Enter the Priority description.
8. Click on the 'Update' button to commit the addition.

Step 21 Creating Defect Severities.

1. Log on to the Admin Console (HTML).
2. Responsibility: DMS System Administrator.
3. Tab: Miscellaneous / Severities.
4. Enter the Severity sort order.
5. Enter the Severity code.
6. Enter the Severity name.
7. Enter the Severity description.
8. Click on the 'Update' button to commit the addition.

Step 22 Creating Defect Languages.

1. Log on to the Admin Console (HTML).
2. Responsibility: DMS System Administrator.
3. Tab: Miscellaneous / Languages.
4. Enter the Language sort order.
5. Enter the Language code.
6. Enter the Language name and Language description.
7. Select the applicable AOL language if available.
8. Click on the 'Update' button to commit the addition.

Step 23 Creating Defect Templates.

1. Log on to the Admin Console (HTML).
2. Responsibility: DMS System Administrator.
3. Tab: Miscellaneous / Templates.
4. Enter a Template name.
5. Enter a Template description.
6. Click on the 'Update' button.
7. Drill down into recently created templates.
8. Select the desired categories and optional type, if desired.
9. Select the associated products from product 'GO!' button if desired.
10. Enter the prompt sequence.
11. Enter the prompt text.
12. Enter the procedure that will pass in the service request id and pass out the service request text in the form of pkg.proc (:p_incident_id);

Step 24 Creating Defect Frequencies.

1. Log on to the Admin Console (HTML).
2. Responsibility: DMS System Administrator.
3. Tab: Lookups / Frequency.
4. Enter the Frequency code.
5. Enter the Frequency description.
6. Enter a start date for when you wish to have this frequency invoked.
7. Click on the 'Update' button to commit the addition.

Step 25 Creating Defect Lifecycles

1. Log on to the Admin Console (HTML).
2. Responsibility: DMS System Administrator
3. Tab: Lookups / Lifecycle.
4. Enter the Lifecycle code.
5. Enter the Lifecycle description.

6. Enter a start date for when you wish to have this lifecycle invoked.
7. Click on the 'Update' button to commit the addition.

Step 26 Creating Defect Resolution.

1. Log on to the Admin Console (HTML).
2. Responsibility: DMS System Administrator.
3. Tab: Lookups / Resolution.
4. Enter the Resolution code.
5. Enter the Resolution description.
6. Enter a start date for when you wish to have this resolution invoked.
7. Click on the 'Update' button to commit the addition.

Step 27 Creating Test Type.

1. Log on to the Admin Console (HTML).
2. Responsibility: DMS System Administrator.
3. Tab: Lookups / Types.
4. Enter the Type code.
5. Enter the Type description.
6. Enter a start date for when you wish to have this type invoked.
7. Click on the 'Update' button to commit the addition.

Step 28 Entering expected Response and Resolution Times.

1. Log on to the Admin Console (HTML).
2. Responsibility: DMS System Administrator.
3. Tab: Process / Resolution Times.
4. Enter optional Defect Category.
5. Enter optional Product Category.
6. Enter optional Severity.
7. Enter expected response time.
8. Enter expected response time unit of measure.

9. Enter expected resolution time.
10. Enter expected resolution time unit of measure.
11. Click on the 'Update' button to commit the addition.

Step 29 Enabling Territory Qualifiers.

1. Log on to Webforms.
2. Responsibility: CRM Foundation Administrator.
3. Navigation: Territory Manager / Territory Administration.
4. Menu: Administration / Enable Qualifiers.
5. Query up the Qualifiers.
6. Enable the Defect Management System qualifiers that you wish to use.
7. Recommendation: Enable 'Phase' and 'Product'.

Step 30 Creating a Territory Type.

1. Log on to Webforms.
2. Responsibility: CRM Foundation Administrator.
3. Navigation: Territory Administration.
4. Select Territory from the LOV in the 'View By' field.
5. Click on 'Oracle Defect Management' from the tree menu.
6. Select 'New'.
7. In the 'Territory Type' screen, enter a name and description of the new territory type.
8. Select qualifiers from the LOV in the 'Transaction Qualifier Name' field.
9. Repeat the process until all required qualifiers for the new territory type has been selected.
10. Click on the 'Save' button from the menu bar to commit the new territory.

Step 31 Defining Territories.

1. Log on to Webforms.
2. Responsibility: CRM Foundation Administrator.
3. Navigation: Territory Administration.
4. Select 'Territory' from the LOV in the 'View By' field.
5. Click on 'Oracle Defect Management' from the tree menu.
6. Select 'New'.
7. In the 'Territory Details' screen, enter a name and description of the new territory you wish to define.
8. Select a transaction type from the LOV in the 'Transaction Type' field.
9. Click on the 'Save' button from the menu bar to commit.

Step 32 Associating Qualifiers with a Territory.

1. Click on the 'Transaction Qualifiers' tab.
2. Select a transaction qualifier from the LOV in the 'Name' field.
3. Click on the 'Resource Qualifier' tab.
4. Recommendation: Have Phase and Product as Territory Qualifiers.
5. Select a resource qualifier from the LOV in the 'Name' field.
6. Repeat the same process until you've set all the resource qualifiers for this territory.
7. Click on the 'Save' button from the menu bar to commit.

Step 33 Associating Resources with a Territory.

1. Click on the 'Resource' tab.
2. Select a resource name from the LOV in the 'Name' field.
3. Repeat the same process until all resources have been added to your new territory.
4. Click on the 'Save' button from the menu bar to commit.

Step 34 Generating a Territory Package.

1. Log on to Webforms.
2. Responsibility: CRM Foundation Administrator.
3. Navigator: Concurrent Request - Run.
4. In the 'Submit Request' screen, select 'Generate Territory Package' from the list item in the Name field.
5. In the 'Parameters' window, select 'Oracle Defect Management' from the LOV in the Usage field.
6. Select 'Defect Transactions' from the list item in the Qualifier Type field.
7. Select choices from the LOV for the Debug flag and SQL Trace fields.
8. Click on the 'OK' button to commit your entries.

Step 35 Mapping Service Request Severity to a Defect Severity.

1. Log on to Webforms. Responsibility: Customer Support.
2. Navigator: Setup / Service Request / Request Severity.
3. Window Name: Service Request Severity.
4. For every service request severity, ensure that a defect severity has been selected.
5. Click on the 'Save' button on the menu bar to commit.

Step 36 Confirm DMS Profiles for Knowledge Base and Notes Integration.

1. Log on to Webforms.
2. Responsibility: System Administrator.
3. Navigation: Profile / System.
4. Select the following profiles and enter as follows:
5. CSS_DEF_KB_SET_TYPE: Confirm the Knowledge Base Set Type ID.
6. CSS_DEF_KB_STATUS: Confirm that the status of the solution would be in the Knowledge Base module when it's first pushed.
7. CSS_DEF_CATEGORY_SET: Confirm the query.
8. CSS_DEF_NOTE_TYPE: Confirm defect creation Note Type.