

# Oracle® *iSupport*

Implementation Guide

Release 11*i*

August, 2000

Part No. A86192-01

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**Oracle iSupport Implementation Manual, Release 11i**

**A86192-01**

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- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most about this manual?

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Redwood Shores, CA 94065  
USA

If you would like a reply, please give your name, address, and telephone number below.

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If you have problems with the software, please contact your local Oracle Support Services.



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# Preface

This manual describes the installation and administration of Oracle iSupport, Release 11i

## Intended Audience

This manual is intended for System administrators or other IT professionals who are responsible for implementing and maintaining Oracle iSupport.

We recommend you have experience in database administration.

## Related Documentation

This manual makes references to other implementation guides. You may also wish to consult the following documentation:

- *Implementing CRM Applications*
- *Oracle iSupport Concepts and Procedures*

The following documentation is referenced within this guide

### *Referenced Documentation*

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Document	Purpose
Implementing CRM Applications	Contains post-installation information on various CRM modules
Implementing Oracle Support	Contains information about Service Requests, Concepts, Implementation and configuration
Implementing Oracle Telephony Manager	Contains information about Telephony Manager, Concepts, Implementation and configuration

***Referenced Documentation***

<b>Document</b>	<b>Purpose</b>
Implementing Oracle Scripting	Contains information about Scripting, Concepts, Implementation and configuration
Implementing Oracle Service Core	Contains information about Knowledge Management and Installed Base Implementation and configuration
Implementing Oracle eMail Center	Contains information about eMail Center, Concepts, Implementation and configuration

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# Overview of Oracle *iSupport*

Oracle iSupport is a comprehensive, Web-based customer care system that enables merchants to proactively provide customer service and support in a self-service environment. Implementing iSupport empowers companies to reduce the cost of providing service, while increasing customer satisfaction and gaining an edge over competitors.

## A Comprehensive Self-Service Environment

Oracle iSupport enables businesses to improve customer satisfaction by offering a wide range of self-service capabilities. Customers can check the status of their orders, enter and modify service requests, perform inquiries against a powerful knowledge management system, view and maintain their installed base, participate in forums, and view transaction history and status. Empowering customers through self-service and self-administration results in increased customer retention and loyalty.

In addition, Oracle iSupport is linked with Oracle Interaction Center for call backs and eMail Center for email management. By reallocating common requests to the web and offering automated response mechanisms, iSupport enables merchants to realize significant savings on customer support and call center activity.

## Service Request Management

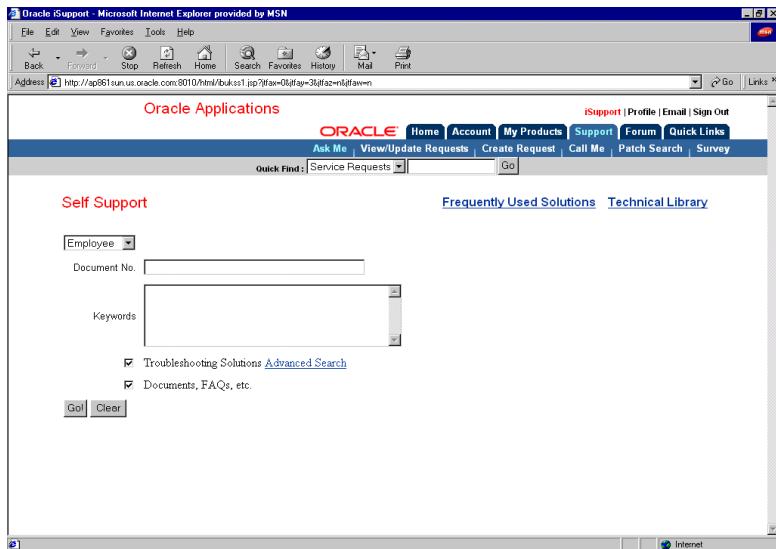
iSupport enables customers to create or modify service requests online. Once the information has been entered and validated, the system returns a request number for future tracking and routes the request to the appropriate agent or queue.



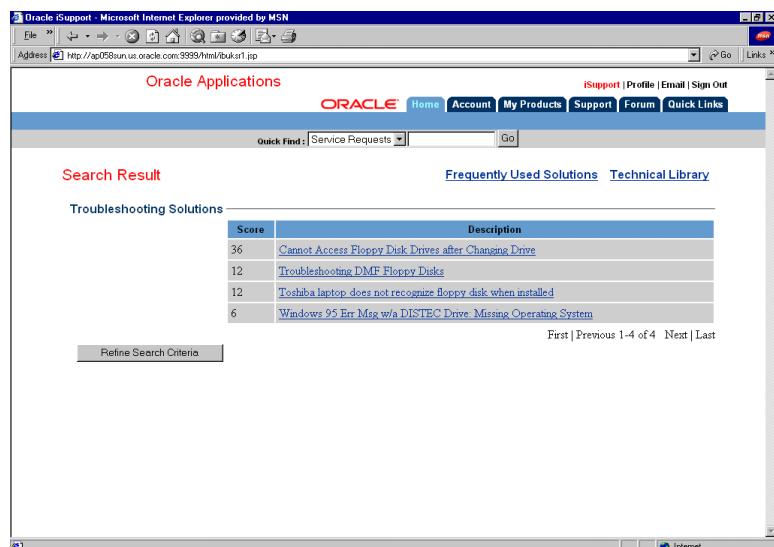
## Knowledge Management

The embedded knowledge management module, leverages the Oracle InterMedia technology and allows the customer to search for solutions to known problems or documents such as white papers, user guides, FAQ's etc. For solutions, the merchant can use the SCA (Symptom, Cause, Action) architecture or define a new one if desired.

The knowledge management system user interface is intuitive and easy to use. Customers can search for solutions by entering keywords, problem statements or phrases.



The results are presented to the user in two parts, solutions and documents.

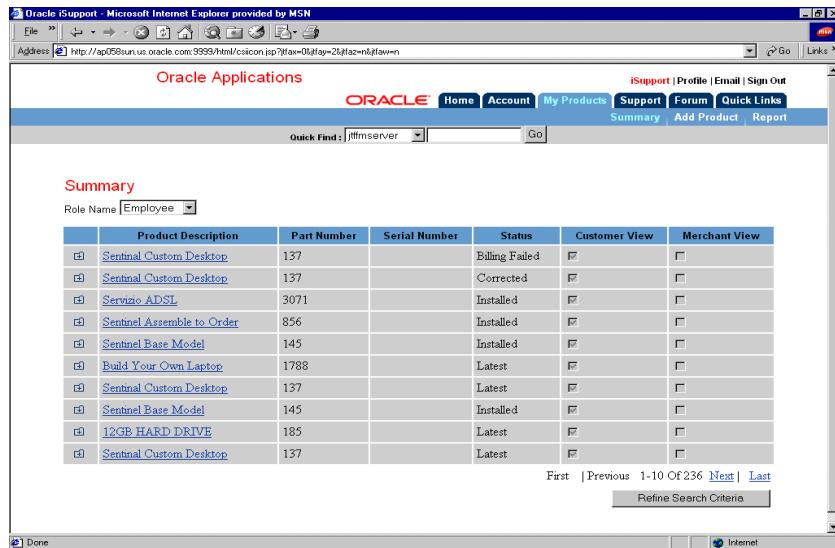


## Installed Base

The Installed Base is a repository which maintains the customer products with all the customer details, service agreements associated with the customer products and product attributes.

It has the capability to create a product in a tree structure showing all its parent and child assemblies, and the ability to drill down on any branch to view the detailed information. In addition, the installed base has the ability to track, update, and maintain a customer's product configuration ('As Ordered, 'As Installed') by updating the parent and child assemblies whenever a new part or component is installed or replaced. It also allows the grouping of customer products into Systems for ease of providing service.

The Installed Base is provided with both a Merchant view and a Customer view.



	Product Description	Part Number	Serial Number	Status	Customer View	Merchant View
<input type="checkbox"/>	Sentinel Custom Desktop	137		Billing Failed	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Sentinel Custom Desktop	137		Corrected	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Servizio ADSL	3071		Installed	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Sentinel Assemble to Order	856		Installed	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Sentinel Base Model	145		Installed	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Build Your Own Laptop	1788		Latest	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Sentinel Custom Desktop	137		Latest	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Sentinel Base Model	145		Installed	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	12GB HARD DRIVE	185		Latest	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Sentinel Custom Desktop	137		Latest	<input checked="" type="checkbox"/>	<input type="checkbox"/>

First | Previous 1-10 Of 236 [Next](#) | [Last](#)

[Refine Search Criteria](#)

## Email Management

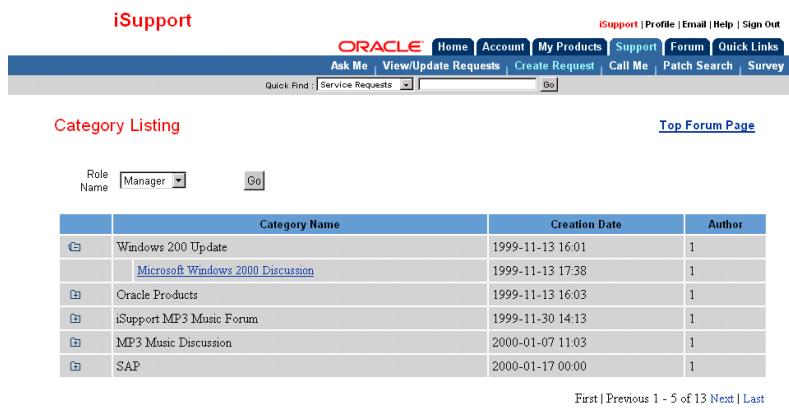
Oracle iSupport integrates with Oracle eMail Center to provide full support for email communications with iSupport users, allowing merchants to provide self-service as well as full-service email based customer service.

eMail Center provides the ability to completely automate complex requests for service and information by supporting Web form based email requests submissions. This flexible solution allows merchants to quickly add new functionality to their iSupport site. Merchants add pre-defined Web form templates to the site and end users can use these forms to request service. The Web forms are converted into emails and processed by eMail Center. eMail Center workflows associated with each Web form can fully automate the resolution of and response to the request by accessing customer data as well as business process functionality available in Oracle's CRM application suite.

eMail Center provides comprehensive functionality to route, automatically respond to and process free-form emails sent in by iSupport users as well as the ability send personalized outbound mailings to iSupport users and track and process responses to these emails.

## Interactive Online Forums

Merchants can offer interactive discussion forums to customers, who have the ability to select forums they want to track and access them directly and easily from the main page. Customers can search for specific subjects, browse within a specific forum, and submit and reply to messages.



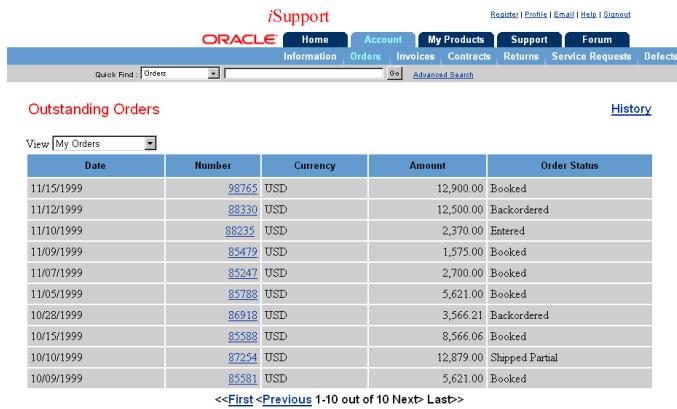
The screenshot shows the Oracle iSupport interface. At the top, there is a navigation bar with links for Home, Account, My Products, Support, Forum, Quick Links, Ask Me, View/Update Requests, Create Request, Call Me, Patch Search, and Survey. Below the navigation bar, there is a search bar labeled 'Quick Find' with a dropdown menu set to 'Service Requests' and a 'Go' button. The main content area is titled 'Category Listing' and shows a table of forum categories. The table has columns for 'Category Name', 'Creation Date', and 'Author'. The data in the table is as follows:

	Category Name	Creation Date	Author
Windows 200 Update	1999-11-13 16:01	1	
<a href="#">Microsoft Windows 2000 Discussion</a>	1999-11-13 17:38	1	
Oracle Products	1999-11-13 16:03	1	
iSupport MP3 Music Forum	1999-11-30 14:13	1	
MP3 Music Discussion	2000-01-07 11:03	1	
SAP	2000-01-17 00:00	1	

At the bottom of the page, there is a link 'First | Previous 1 - 5 of 13 Next | Last'.

## Transactional Inquiries

Customers may access transaction status information on orders, shipments, invoices, payments and service requests and modify information at any time. Customers can also query and sort data by a range of criteria.



The screenshot shows the Oracle iSupport interface. At the top, there is a navigation bar with links for 'iSupport', 'ORACLE', 'Home', 'Account', 'My Products', 'Support', 'Forum', 'Information', 'Orders', 'Invoices', 'Contracts', 'Returns', 'Service Requests', and 'Defacts'. Below the navigation bar is a search bar with 'Quick Find' and 'Orders' dropdowns, and a 'Advanced Search' button. The main content area is titled 'Outstanding Orders' and 'History'. A table displays 10 rows of order information. The table has columns for Date, Number, Currency, Amount, and Order Status. The data is as follows:

Date	Number	Currency	Amount	Order Status
11/15/1999	98765	USD	12,900.00	Booked
11/12/1999	88330	USD	12,500.00	Backordered
11/10/1999	88235	USD	2,370.00	Entered
11/09/1999	85479	USD	1,575.00	Booked
11/07/1999	85247	USD	2,700.00	Booked
11/05/1999	85788	USD	5,621.00	Booked
10/28/1999	86918	USD	3,566.21	Backordered
10/15/1999	85588	USD	8,566.06	Booked
10/10/1999	87254	USD	12,879.00	Shipped Partial
10/09/1999	85581	USD	5,621.00	Booked

At the bottom of the table, there are navigation links: '<<First', '<Previous', '1-10 out of 10', 'Next>', and 'Last>'.

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# Implementation Overview

This section provides overviews of the Oracle iSupport application and its administration components, as well as iSupport's relationship to other Oracle Applications.

## iSupport Administration Overview

Oracle iSupport is a self-service customer care system that enables you to proactively provide customer service and support via the Web. iSupport Administration offers an easy and efficient way to set up and customize Oracle iSupport to fit your company's needs.

iSupport Administration has the following features which are organized within the following Navigation Tabs inside the Administration Console:

### ***Navigation Tabs and features within iSupport Administration***

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Navigation Tab	Features
Profile	Personalized Homepage Management Subscription and Notifications setup

***Navigation Tabs and features within iSupport Administration***

Navigation Tab	Features
Support	Service Request Management Call Me Setup Feedback Surveys Management Knowledge Base setup Usergroups Management
Email Template	eMail Template Setup
User Forum	Categories, Forums and Message Management

In addition iSupport Administration also provides features for creating and setting up Users. For the implementation of Installed Base and Defects & Enhancements Management System, please refer to the respective Implementation Guides.

## Personalized Homepage

The customer can personalize their own home page to accommodate their specific working habits and requirements. The Homepage is divided into sections containing categories of information such as News, Service Requests, Orders, Defects, and Forums. The customer can hide/show sections, personalize the layout, and filter the content.

You can set default severities and status as well as determine how a request gets submitted to Support.

You can set up the customer home page so customers can receive company news. You can also define specific sections or bins and the format in which they appear.

## Service Request Management

iSupport is integrated with Service so customers can submit service requests online. The data requested includes a problem description and comments, customer date, status and severity levels. Once the information has been entered and validated, the system will return a request number for future tracking. The customer can modify this request at anytime, to add information, increase the severity, modify the contract information.

## Call Me

Call me allows a customer to contact Support simply by clicking a button on the Service Request page.

You can enter Oracle Telephony Manager information on the Call Me Administration page to set up the Call Me feature.

## Feedback/Survey

The Feedback page allows customers to provide feedback and respond to surveys. You can use the Feedback Administration page to set up the feedback feature.

## Knowledge Base

Customers can search the knowledge base to find answers to their questions instead of calling a support agent on the phone. Knowledge Base Search organizes the search process so data is categorized in an easy and efficient manner. Using a natural language mechanism, customers can enter a search statement in the form of a question, and the knowledge base returns solutions related to the statement. The knowledge base can be accessed from both the Support application and the iSupport application. For more information, see [Implementing Knowledge Management](#). In addition to searching for statements and solutions in the knowledge base, customer can search for technical documentation using the marketing Encyclopedia.

Use the Knowledge Base Administration screens to set up the knowledge base for both iSupport and Customer Support. Knowledge Base Administration allows you to create statement and solution types as well as search, create, and modify solutions. For more information on Knowledge Base Administration, see [Administering Knowledge Base](#).

## Usergroups

Usergroups allow you to administer users into groups. You can enter Usergroup information on the Usergroup page to set up this feature.

## eMail Template

Email Center Management routes and responds to customer email. Call me allows a customer to contact Support simply by clicking a button on the Service Request page.

You can enter Oracle eMail Center information on the eMail Template Administration page to set up this feature.

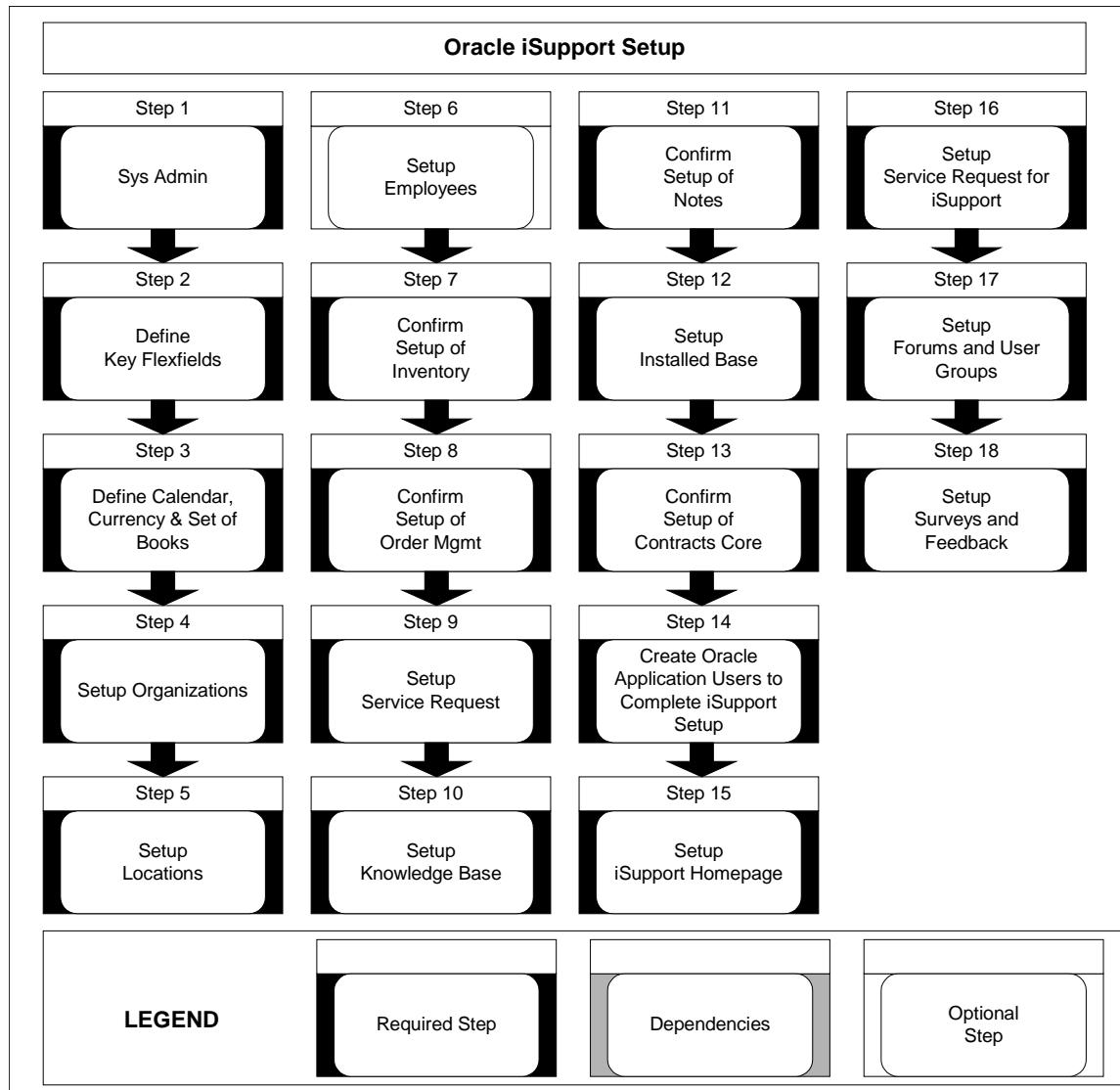
## User Forum

A forum is an interactive area for discussions and commentaries that is dedicated to a certain topic. The customer can track only the forums she wants to see so they can be accessed easily and directly from the home page.

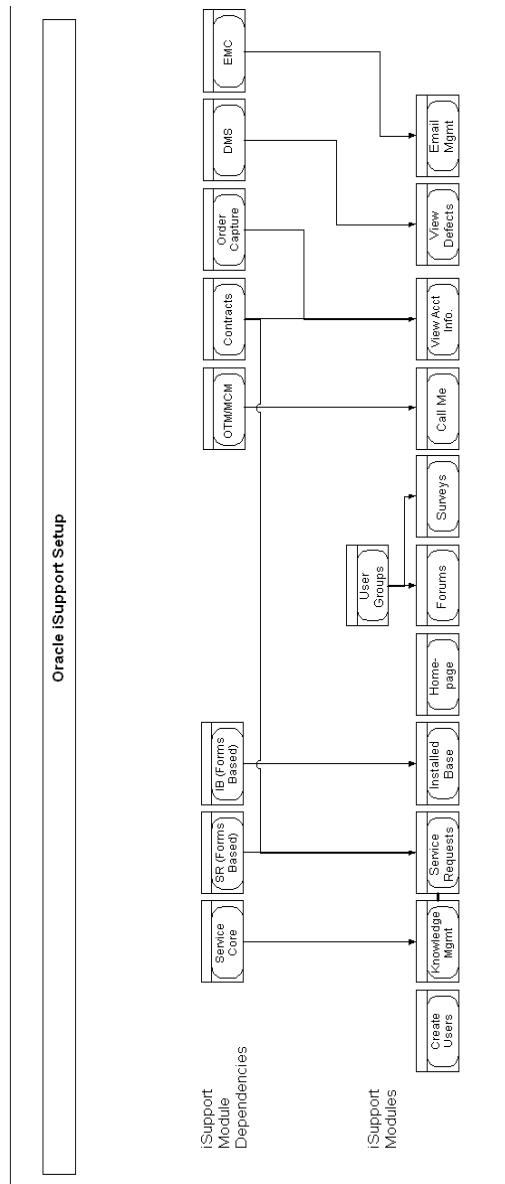
Using Forum Administration, you can set up and manage forums for a particular customer or usergroup(s).

# Setup Flowchart

A high level flow of a possible iSupport implementation would include:



# iSupport Modules and Dependencies



## Setup Checklist

It is possible to select which iSupport modules to implement, the respective module dependencies are illustrated as above. The Implementation order is not important.

Step Title
Create Users to Complete iSupport Setup - This step is prerequisite to all iSupport setups
Setup Homepage
Setup Service Requests
Setup Call Me
Setup Surveys
Setup Knowledge Management
Setup User Groups
Setup eMail Template Management
Setup Forums
Confirm Account Setup (View Orders, Shipments, Payments, Invoices, Returns, Contracts)
Confirm Setup of Installed Base
Confirm Setup of Defects



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# Implementing Oracle *iSupport*

## Creating a System Administration User for iSupport

To create a System Administration User for iSupport involves the following steps:

- Create a new user
- Associate iSupport system administrator role to the new user
- Associate iSupport system administrator responsibility to the new user

### Creating a New User

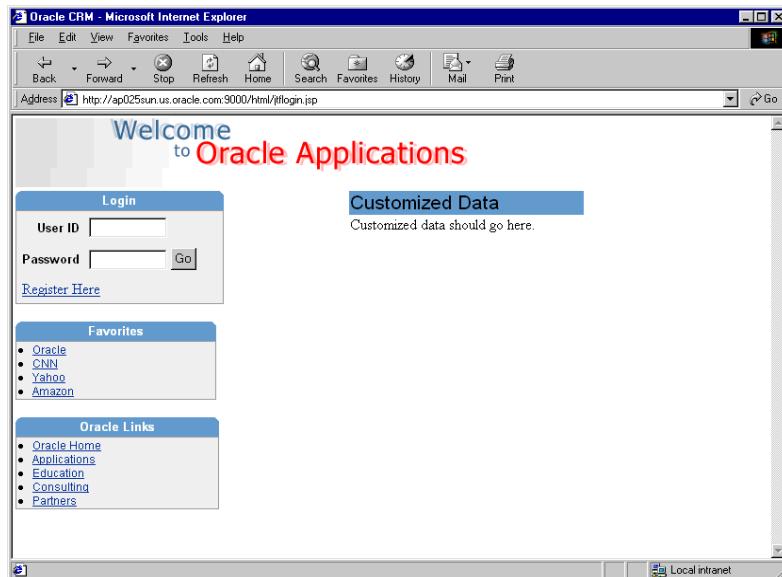
Use this procedure to create a new user

#### Prerequisites

None

## Steps

1. Navigate to HTML login page.



2. Click the "Register here" link, which will bring you to the self-registration page

Note: Merchant can also register new users by logging in to System Administration Console, navigating to "User" tab and "Add" subtab. They will then see the same user-registration screen as above and will be required to enter the same information.

User Registration

\* First Name

\* Last Name

\*UserName

\*Password

\* Verify Password

\* EMail

Account Type

\*Indicates Required Field.  
\*Password should be atleast 6 characters long.

Submit Clear

Enter user's first name, last name, username, password, email address, and select "Business User" or "End User". A "Business User" belongs to a company and an "End User" is a single end user.

Click Submit button when completed.

3. Select "Company ID" radio button if the registration belongs to an existing company and enter the respective company ID into the textbox. Otherwise, enter the new company information.

**User Registration Continued.**

I have my Company Id

I do not have my Company Id

\*Company Name

\*Address Line1

Address Line2

Address Line3

\*City

\*State

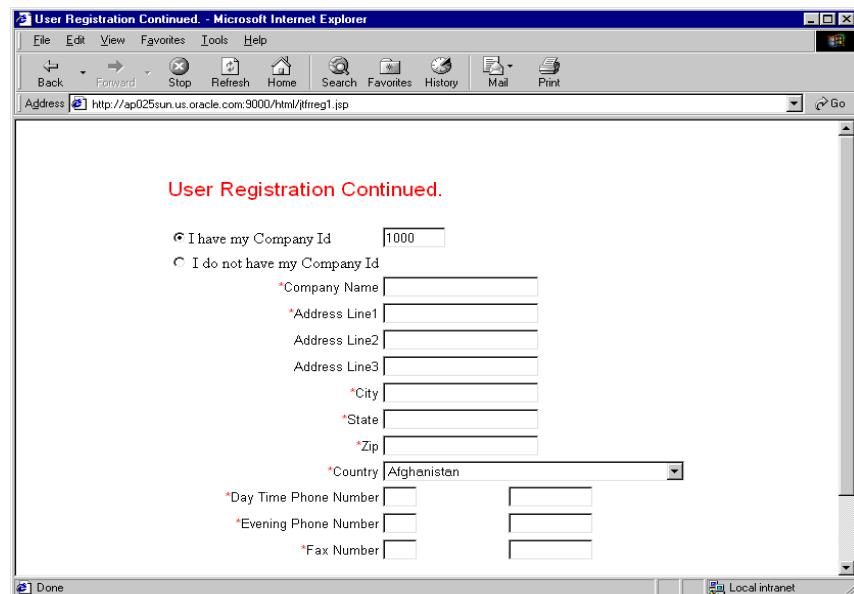
\*Zip

\*Country

\*Day Time Phone Number

\*Evening Phone Number

\*Fax Number



The following information is required:

- Company Name
- Address
- City
- State
- ZIP
- Country
- Daytime phone number
- Evening phone number
- Fax number

Click Submit button when completed.

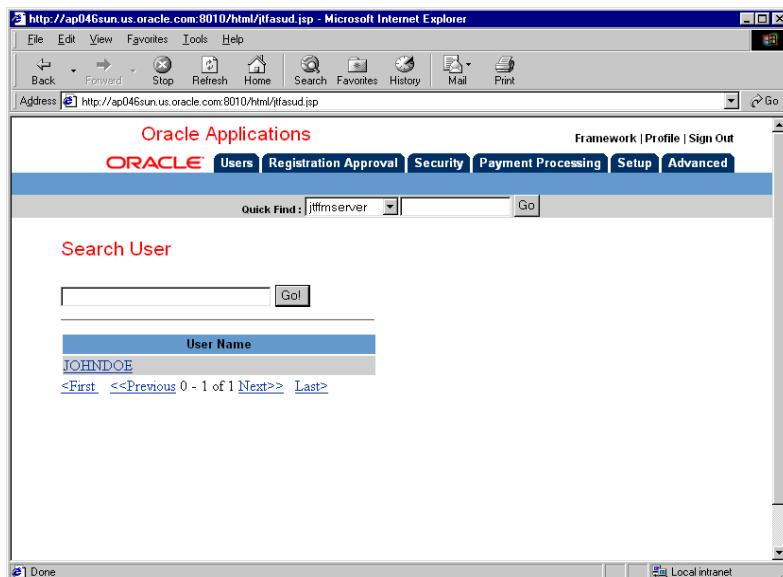
## Associate iSupport System Administrator Role to the User

### Prerequisites

New user has been created

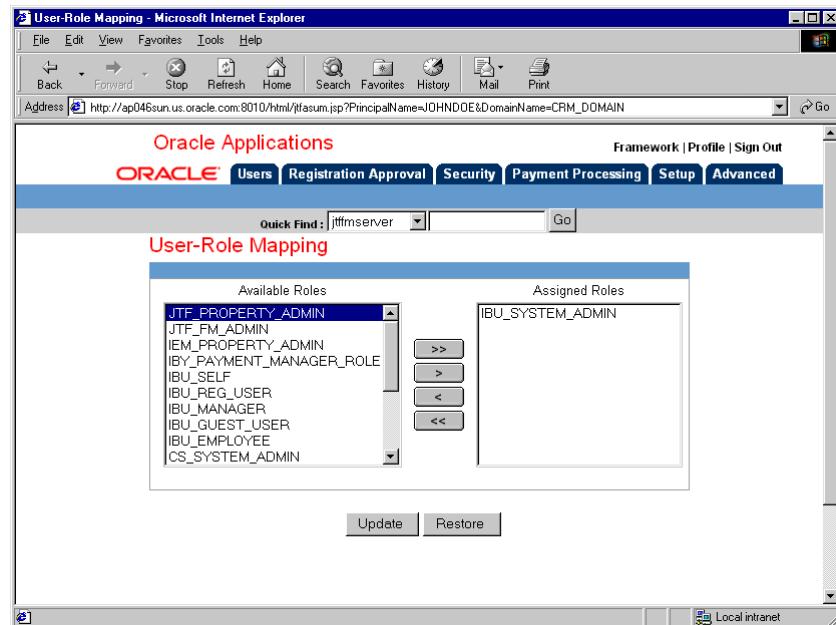
### Steps

1. Navigate to HTML login page.
2. Login as the System Administrator User. The system administration console will be displayed
3. Query back the username that you have just created in the "Search User" box. Matching usernames will be returned. Select the user by clicking on the link.



4. The merchant must assign roles to the user. At a minimum "IBU\_SYSTEM\_ADMIN" role must be assigned for iSupport system administrator privileges.

To assign role, select the required roles from the "Available Roles" list box, and then click the "Right Arrow" button to assign roles (The "Left Arrow" button deselects assigned roles. The "Double Left Arrow" deselects all assigned roles, similarly the "Double Right Arrow" assigns all available roles).



Selected roles should then appeared in the "Assigned Roles" list box. Click Update button to save changes.

5. Role assignment is completed, the merchant can sign out.

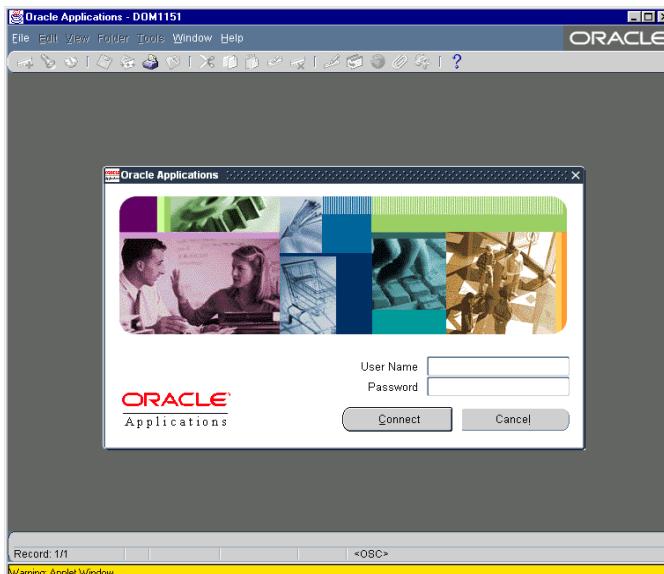
## Associate iSupport System Administrator responsibility to the user

### Prerequisites

New user has been created and System Administrator role has been assigned to the user

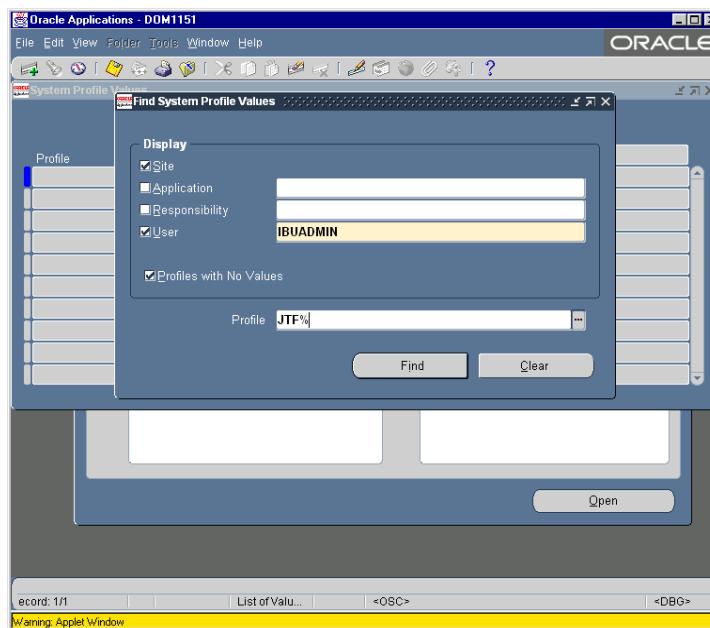
## Steps

1. Login to Oracle Applications.



2. Select "System Administrator" responsibility.

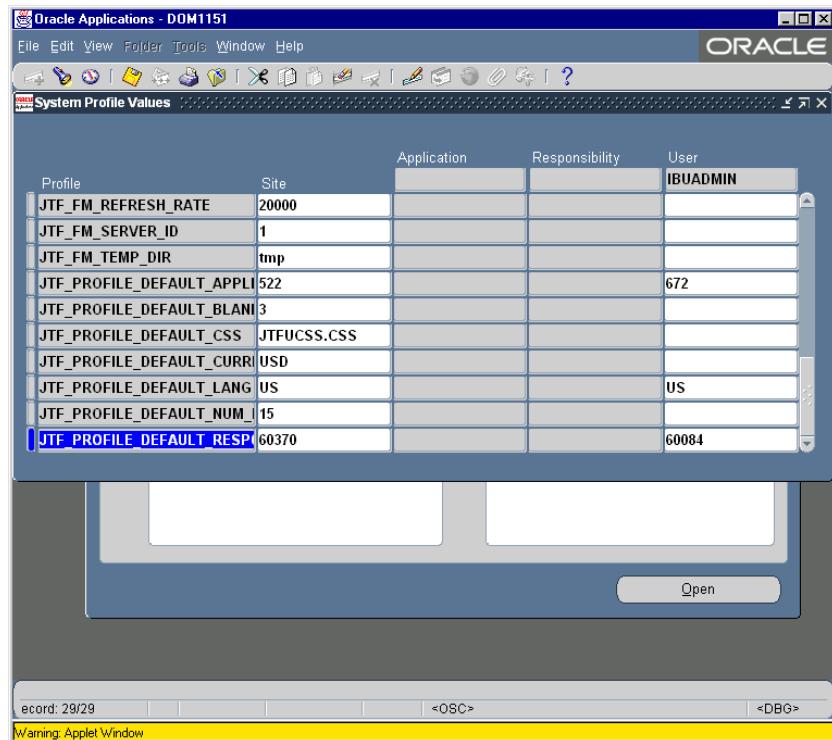
3. Select "Profile" and then "System".



Check the "User" checkbox, enter the username that you just created. To refine the search criteria, enter "JTF%" in the Profile box. This will reduce the search result to system profiles that belong to JTF.

4. The system profiles that needs to be setup are called:

- JTF\_PROFILE\_DEFAULT\_APPLICATION
- JTF\_PROFILE\_DEFAULT\_RESPONSIBILITY



Note: JTF\_PROFILE\_DEFAULT\_APPLICATION specifies the default application for the user. JTF\_PROFILE\_DEFAULT\_RESPONSIBILITY specifies the default application menu structure for the user. The merchant must confirm and assign both these system profile values. The following steps outline a possible process for gathering the application ID:

- Within Oracle Application, under System Administrator responsibility, navigate to "Application" and then "Register"
- Select "View" menu, "Find" option
- Enter "iSupport" in the Find box, and click Find button
- For JTF\_PROFILE\_DEFAULT\_APPLICATION set to 672.

The following steps outline the process involved in gathering the responsibility ID:

- Within Oracle Application, under System Administrator responsibility, navigate to "Security", "Responsibility" and then "Define"

- Select "View" menu, "Find" option
- Enter "IBU\_SYS\_ADMIN%" in the Find box, and click Find button
- Note the "RESPONSIBILITY\_ID"
- Set the profile option JTF\_PROFILE\_DEFAULT\_RESPONSIBILITY to the above noted RESPONSIBILITY\_ID. (Unlike application ID, the responsibility ID system profile value does not have a default.)

When the merchant has set these profile values, responsibility assignment is complete and the merchant can exit Oracle Application.

### **Profile Options for a user**

#### ***Profile Options for a user (optional)***

<b>Profile Option</b>	<b>Purpose</b>
ICX_LANGUAGE	Specifies the default language for the user
JTF_PROFILE_DEFAULT_CURRENCY	Specifies the default currency code for the user
JTF_PROFILE_DEFAULT_NUM_ROWS	Specifies the number of rows to show in HTML table
JTF_PROFILE_DEFAULT_BLANK_ROWS	Specifies the number of new rows to show in HTML table
JTF_PROFILE_DEFAULT_CSS	Specifies the default HTML style sheet to be used in all HTML pages

## **Profile Tab**

Use the Profile Tab to manage iSupport Homepage information.

## **Defining Personalized Homepage**

You can use Personalized Homepage to select and define the homepage sections you want to make available to all users.

## **Selecting Homepage Categories**

Use this procedure to define sections.

## Prerequisites

None

## Steps

1. Select the Profile Tab. The Homepage Administration page appears.

Category	Bin		Section			
	Display?	Mandatory?	Criteria	Display?	Mandatory?	Criteria
Service Requests	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Configure"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Configure"/>
Company News	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Configure"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Configure"/>
Defects	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Configure"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Configure"/>
Alerts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Configure"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Configure"/>

2. Select the categories you want to make available to your customers.
3. Click **Change Category Selection and Order**.

Available Categories	Selected Categories
- No Category -	Service Requests Company News Defects Alerts

4. From the Available Categories list box, select a category.
5. Click the right arrow button. The selected section appears in the Available Categories box.  
To move a section from the Selected Categories to the Available Categories, click the double left arrow button.
6. To change the order in which the categories appear, click the up or down arrow to the right of the box to move sections up or down.
7. Click **Update**. The selected sections appear on the customer's homepage.
8. From the Selected Categories box, select a category and click **Configure**. You are now ready to configure the selected category.

## Configuring Your Section or Bin

Use the Configure block in the Homepage Administration page to specify whether each section is mandatory or optional, the maximum number of rows for each section, and the number of days a note is posted on the homepage. Use this procedure to configure your section or bin.

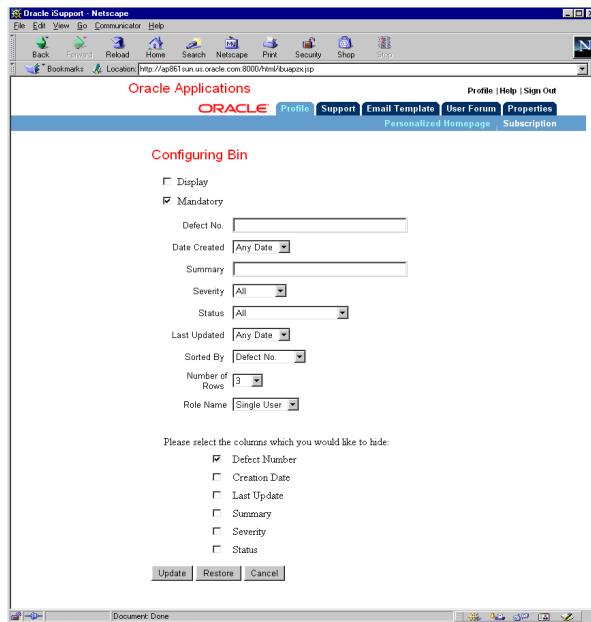
### Prerequisites

None

### Steps

1. Navigate to iSupport Administration.
2. Select the Profile tab.

3. Select the appropriate bin/section.



4. Select **Display** if you want the section or bin displayed to the customer.
5. Select the **Mandatory** check box if you do not want the section modified by the customer.
6. Enter the maximum number of rows for each section.
7. Enter the date (DD-MON-YY format) to define the number of days an item is displayed on the user's homepage.
8. Enter the title.
9. Enter the description.
10. Click **Update**. The defined sections are available for all users.
11. Click **Change Selection and Order**. You can now change the selection and order in which the categories appear.

## Setting Up Subscription Information

You can use this administration page to set up subscription templates and set email intervals.

### Setting Up Subscription Templates

Use this procedure to set up subscription templates.

#### Prerequisites

None

#### Steps

1. Navigate to iSupport Administration.
2. Select the Profile tab.
3. Click Subscription.
4. From the Language drop-down list, select the language for your template.
5. Enter the subject for your template
6. In the Header text field, enter the current date.
7. In the Footer text field, enter the last mail date.
8. Click **Update**.

### Setting Email Subscription Intervals

You can use this administration page to set email intervals. You can define the time interval that appears for the customer in a drop-down list. Use this procedure to define the ranges and to set a default interval.

#### Prerequisites

None

#### Steps

1. Select Subscription.
2. Select Email Interval.
3. In the range start box, set the minimum time between emails

4. In the range end box, set the maximum time between emails.
5. In the range set box, set the step between the start and end time.
6. In the default interval box, set the default interval to appear in the drop-down list.
7. Click **Update**.

### **Subscriptions Concurrent Program**

The Subscriptions concurrent program for tracking user subscriptions in the queue will also need to be configured from Oracle Applications. The name of this Concurrent program is called "Message Delivery Scheduler", and should be configured to run periodically.

## **Support Tab**

Use the Support tab to manage service request, call me, and survey information.

## **Managing Service Requests**

Use the Service Request Management page to set severity levels, status, and routing information for service requests. You can also choose how a service request should be routed for a customer. You can choose to either have the request directly submitted to a support agent, initiate the Knowledge Base search screen, or prompt the customer to make the choice.

### **Prerequisites**

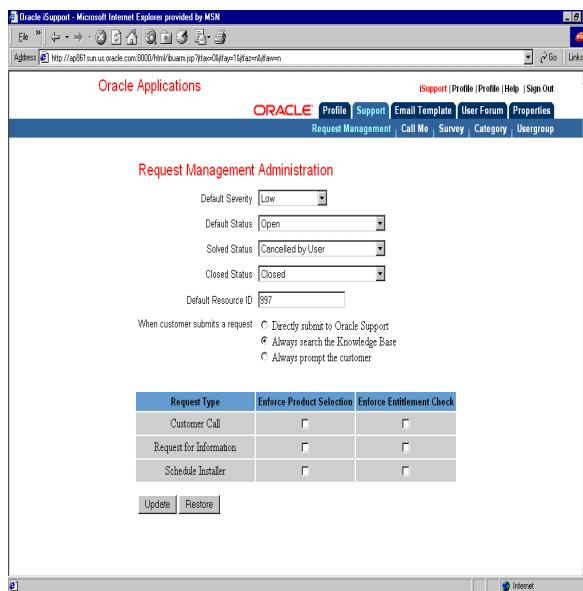
Make sure you set up Service Request as described in the implementing section of Oracle Service Request Documentation.

Ensure that all the following steps have been reviewed and completed as necessary:

- Confirm setup of Request Severity values
- Confirm setup of Request Status values
- Confirm setup of Solved Status values
- Confirm setup of agents in Resource and Assignment
- Confirm setup of Notes

## Steps

1. Navigate to iSupport Administration
2. Select the Support tab.
3. Click Request Management Administration.
4. From the drop-down lists, enter the default statuses for the Service Request page.



This step involves selecting default values for Severity, Request Status, Solved Status, Closed Status, and Resource ID. These values will default to the service request at creation and can be over written by the user with values from LOV.

5. Setup knowledge search (Optional). You can setup your service request submission process to include a solution search prior to service request submission. Select from one of the radio button choices for "When customer submits request"
6. Enforce product selection and entitlement verification (Optional). You may want to enforce product selection for a particular request type. For example, when a customer selects "Problem Resolution" you may want to enforce the

selection of a product from the product LOV. You may also want to perform entitlement verification for the selected product.

When entitlement checking is enforced, a validation process occurs ensuring customer has correct service level in contract for a given product.

7. Depending on how you want the service request routed, choose an appropriate radio button.

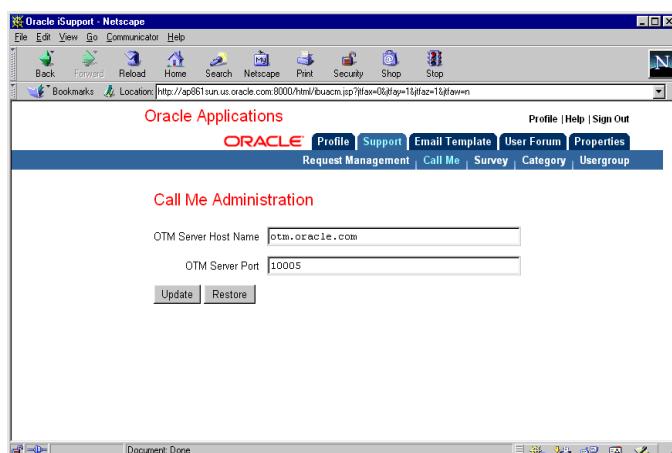
## Call Me Setup

### Prerequisites

Setting up the Call Me feature in iSupport involves entering the OTM Server Host Name and the OTM Server Port. Confirm OTM server has been setup and is running

### Steps

1. Navigate to iSupport Administration
2. Select Support tab, Call Me sub tab
3. Enter OTM Server Host Name
4. Enter OTM Server Port
5. Select "Update" button to save or select "Restore" button to cancel.



## Surveys Setup

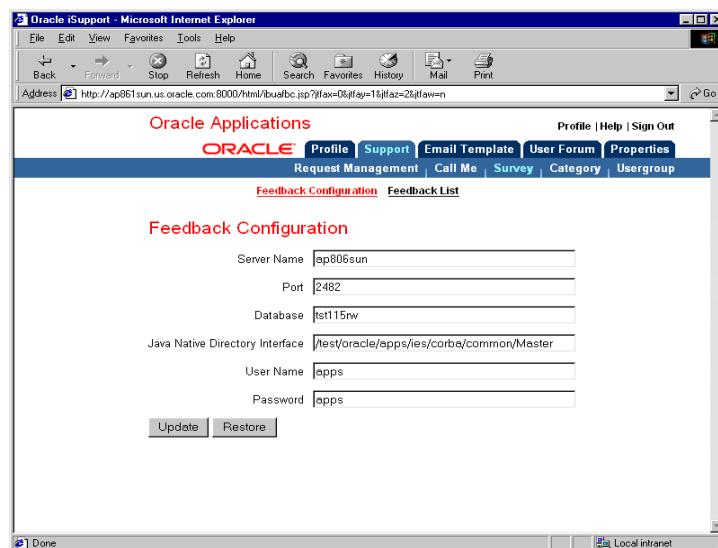
Use the Survey tab to set up feedback templates so customers can provide feedback on certain topics or sections of iSupport. You can also assign a feedback template to one or more user groups. Use this procedure to set up the feedback option for your customers.

### Prerequisites

Oracle Scripting setup needs to be confirmed before iSupport can provide any Survey functionality.

### Steps

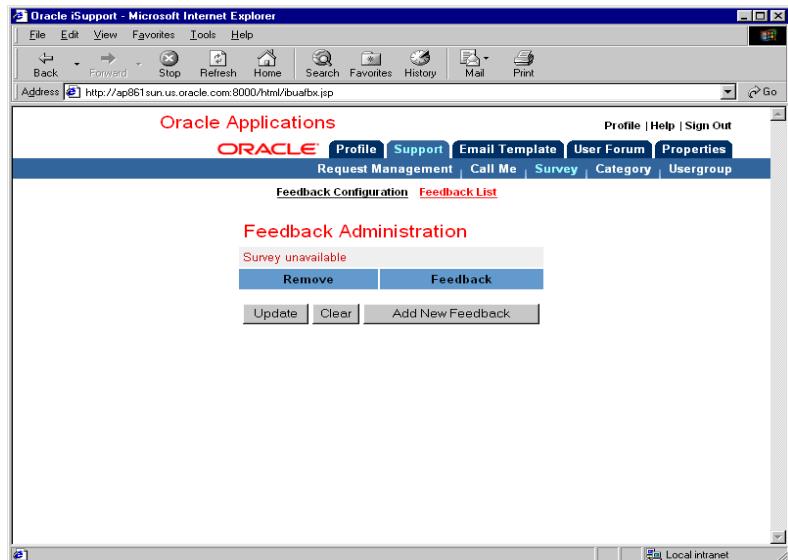
1. Navigate to Isupport Administration
2. Select the Support tab, Survey sub tab
3. Click Feedback Configuration



4. Enter server, database, user name, and password information.

The merchant is required to setup the scripting server in order to use iSupport Surveys. The server side configuration includes defining the hostname, port number, database name, Java Native Directory Interface (JNDI) string, and the username/password to connect to the scripting server.

5. Click **Update**.
6. To view the current list of feedback templates (Surveys) and to add new templates, Click the Feedback List link



7. Select a predefined feedback name from the feedback list.
8. From the Associated User Groups table, select the user groups you want to send the feedback template to.

The Merchant is required to associate user groups to Surveys, otherwise they would not be visible to any users. The Merchant would query back a particular Survey and then select user groups to associate with it

In this same form, it is also possible to update and delete user groups to existing Surveys

9. Click **Create**. Your feedback templates are now mapped to specified user groups.

## Setting Up News Categories

You can set up information categories for the company news section on a customer's homepage. Use this procedure to set up categories.

### Prerequisites

Make sure you set up Knowledge Management as described in the implementing section of Understanding Knowledge Management In CRM.

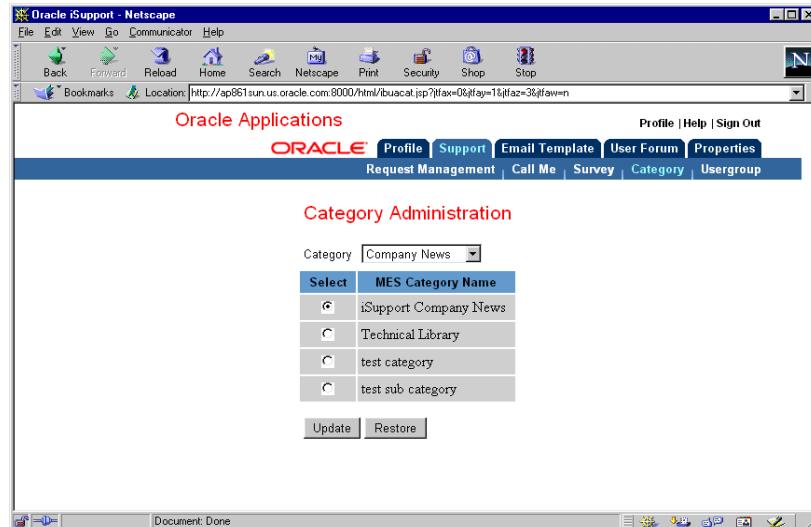
Ensure that all the following steps have been reviewed and completed as necessary:

- Confirm setup of Solution Sets
- Confirm setup of Frequently Used Solutions
- Confirm setup of document content defined in MES

In addition, the steps must be completed from the iSupport System Administration screens.

### Steps

1. Navigate to iSupport Administration
2. Select Support tab, Category sub tab



3. Choose the categories you want to add to a customer's company news section.

4. Click **Update**.

## Usergroup Setup

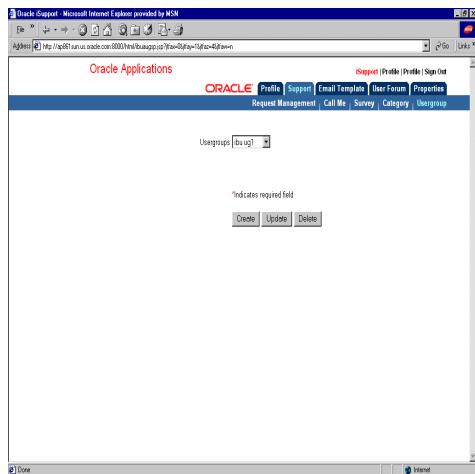
Use this procedure to create Usergroups

### Prerequisites

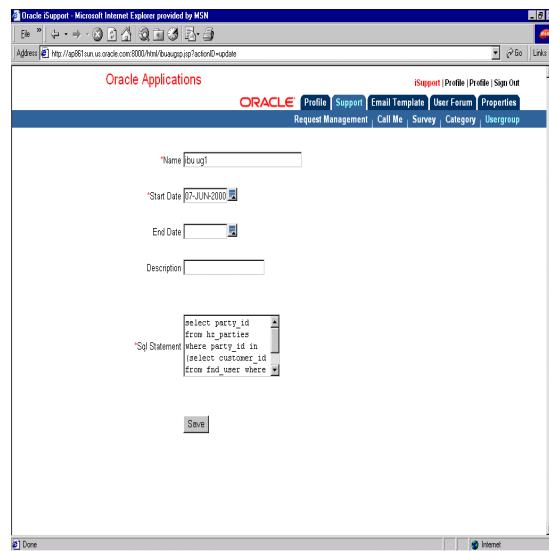
Users have been created

### Steps

1. Login to iSupport Administration
2. Select Support tab, Usergroup sub tab



3. Click "Create" button
4. Specify Start and End dates for your Usergroup and enter a SQL Statement to define the usergroup
  - SQL statement should be like "select party\_id from hz\_parties where ...."



5. Save
6. Run the concurrent program, "Usergroup creation". Short name=IBUUG. This program populates additional tables and makes the user group visible in MES. Subsequent publishing in MES can be viewed in the Alerts section on the Homepage.

After making updates to a user group the concurrent program needs to re-run.

## Email Management Setup

Use the Email tab to setup Email

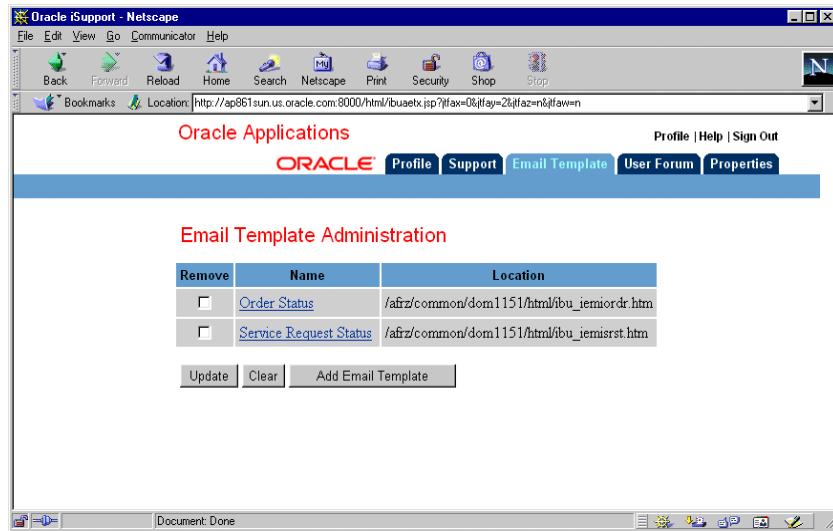
Use the procedure to set up templates for your customers. You can remove existing templates or add a template. Note: Oracle Email Center setup needs to be confirmed before iSupport can provide any email template functionality.

### Prerequisites

Confirm Email Center and all its dependent products has been successfully setup. Please refer to Email Center Implementation Guide for further details.

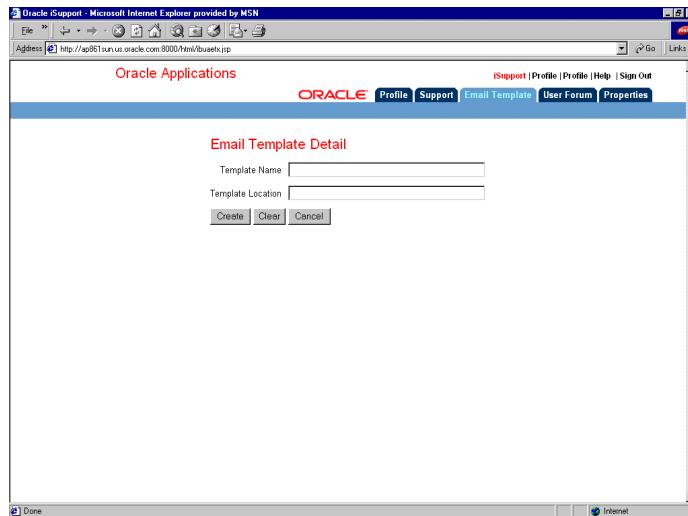
## Steps

1. Navigate to iSupport Administration
2. Select the Email Template tab.



3. To remove a template, select the template by checking the respective check box and click the **Update** button.
4. To view a template, click the template name in the table.
5. To add a template, click the **Add Email template** button.

Merchants can add new email templates by selecting "Add Email Template". They will need provide the template name and location as the absolute path where to find these templates in the file system. The templates themselves are created by using Oracle Email Center's application. Merchants can remove email templates from the lists by checking the templates (remove column) and then click the "Update" button.



## Forums Setup

Use the Forums tab to manage Forums

### Managing Categories

Forums are contained within categories. Use the Category screens to create, remove, or rename forum categories.

Before a user can post/reply messages to a Forum, the System Administrator needs to create at least one Forum within a Category. Categories and Forums are organized in a tree structure to allow easy access and navigation.

### Prerequisites

None

### Steps

1. Navigate to iSupport Administration

2. Select User Forums tab, Category sub tab



3. Choose the access type.
4. If you want categories available for all users, then select the Opened option.
5. To restrict a category to a specific user group, select Restricted.
6. To close a category, choose Closed.

## Managing Forums

A forum is an interactive area for discussions and commentaries that is dedicated to a certain topic. Forums allow you to post questions and comments and to reply to questions posted by others.

### Creating a New Forum

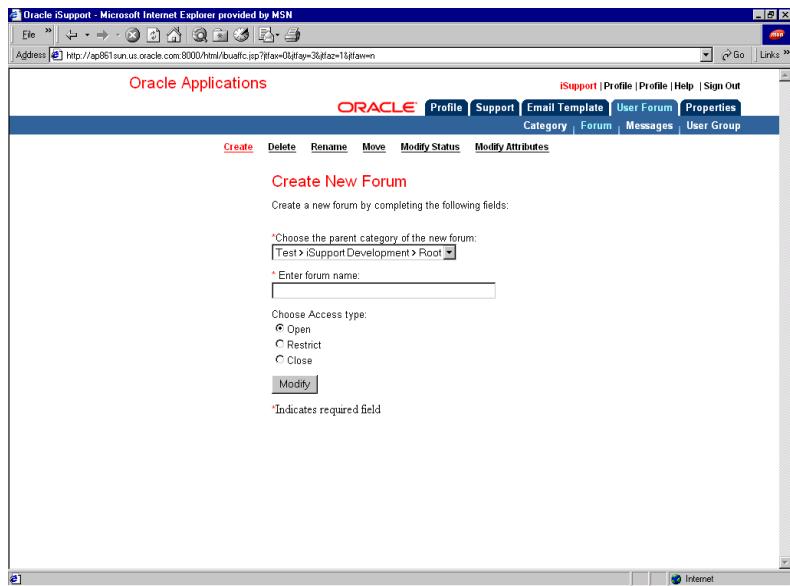
Use this procedure to create a new forum.

### Prerequisites

None

## Steps

1. Select the Create Forum link.



The screenshot shows a Microsoft Internet Explorer window with the title 'Oracle iSupport - Microsoft Internet Explorer provided by MSN'. The address bar shows the URL: <http://ap861sun.us.oracle.com:8000/html/buafrcisp?flav=0&flay=3&flaz=1&flawn>. The page content is titled 'Create New Forum' and instructs the user to 'Create a new forum by completing the following fields:'. It has a dropdown for 'Choose the parent category of the new forum' with 'Test > iSupport Development > Root' selected. A required field indicator (\*) is next to the 'Enter forum name:' input field. Below it is a 'Choose Access type:' section with radio buttons for 'Open' (selected), 'Restrict', and 'Close'. A 'Modify' button is at the bottom. A note at the bottom states: '\*Indicates required field'.

2. Enter the new forum name in the Create new forum field.
3. Choose the appropriate access type from the access type radio buttons.
4. Click **Submit**. The new forum name is added to the main forum list.

Note: Duplicate forum name in the same level (have the same parent) is not allowed

## Renaming a Forum

You can rename a forum at any time.

## Prerequisites

None

## Steps

1. Select the Rename Forum link.

2. From the drop-down list, select the existing Forum you want to rename.
3. Enter the new forum name.
4. Click **Submit**. Your changes will appear immediately on the Forum page.

### **Moving or Deleting a Message from a Forum**

You can move a message or message thread between forums. To move a message from one forum to another, follow these steps.

#### **Prerequisites**

None

#### **Steps**

1. Choose a forum to move.
2. Choose the destination.

### **Change Forum Status**

If you want categories available for all users, then select the Opened option. To restrict category to a specific user group, select Restricted. To close a category, choose closed.

### **Maintaining Message Headers**

Message Headers are attributes located at the top of each message that may include items such as forum name, product, and product version. You can create, delete or modify headers.

#### **Prerequisites**

None

#### **Steps**

1. Select a forum from the drop-down list.
2. Click **Next**.
3. Enter the header name or modify the existing header.
4. Select the mandatory check box to make the header a required field for the customer.

5. Enter the header value or modify the existing value.
6. Click **Modify**. The new header information is displayed for that forum.

### **Creating a New Header**

You can create a new header for a forum. You can create up to three headers for an individual forum.

#### **Prerequisites**

None

#### **Steps**

1. In the header name field, enter the new header name.
2. In the header value, enter the header value.
3. Select the mandatory check box to make the header a required field for the customer.
4. Click **Add header field**. Your new header is displayed for that forum.

### **Moving Messages**

You can move a message from one forum to another. Use this procedure to move messages.

#### **Prerequisites**

None

#### **Steps**

1. Select the User Forum tab.

## 2. Click Messages.



3. From the drop-down list, select the forum for the message you want to move.
4. Click **Next**.
5. Click the **Move** link next to the message you want to move.
6. From the drop-down list, select the forum where you want the message to be moved.

Click **OK**. You can now view your message in the new forum.

## Associating User Groups to Forums

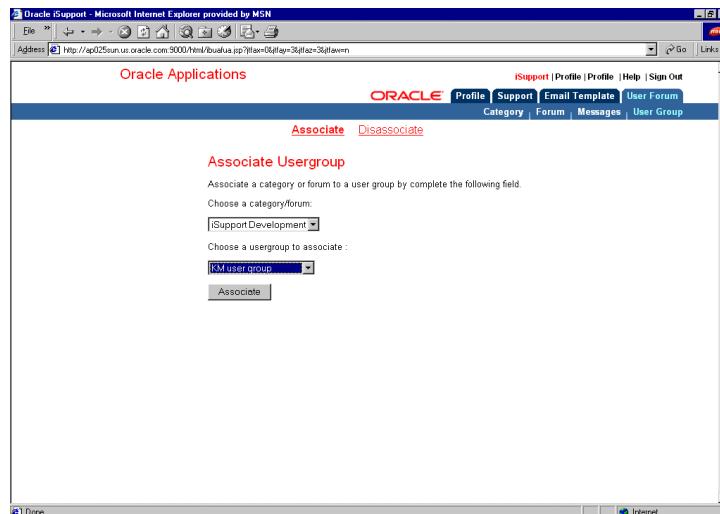
Use this procedure to associate a user group with a forum.

### Prerequisites

None

### Steps

1. Select User Forum tab, usergroup sub tab



2. From the drop-down list, choose a category.
3. Choose a user group.
4. Click **Associate**. The user group can now access the selected forum.
5. Click to Disassociate a Category to a Usergroup

## Properties Tab

Use the Properties tab to manage information regarding

### Account Setup (Creating Returns)

Viewing Orders, Shipments, Payments, Invoices, and Contracts does not require any setups within iSupport. There however, some required post installation steps for Creating Returns.

Use this procedure to Create property names and values for the company

## Prerequisites

None.

## Steps

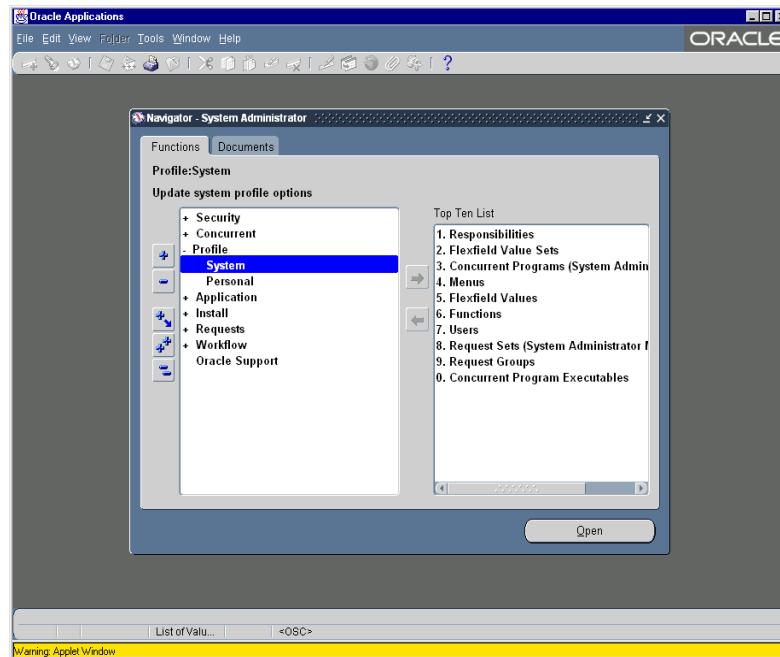
1. Login into CRM System Administration as sysadmin/sysadmin
2. Select the advanced tab
3. Choose IBU view

Key	Value
COMPANY_ADDRESS	200 Oracle Parkway, Redwood Shores, CA 9403
COMPANY_EMAIL_ADDRESS	info@oracle.com
COMPANY_MERCHANT_NAME	John Doe
COMPANY_NAME	Oracle Corporation
COMPANY_URL	http://www.oracle.com
search_factories	oracle.apps.fnd.requests.bean.RequestSearchFa
service.oracle.apps.fnd.communities.bean.MyFormSearchFactory.categories	Form
service.oracle.apps.fnd.communities.bean.MyFormSearchFactory.items	MyFormSearchItem
service.oracle.apps.fnd.request.bean.DefectSearchFactory.categories	Defects
service.oracle.apps.fnd.request.bean.DefectSearchFactory.items	DefectSearchItem

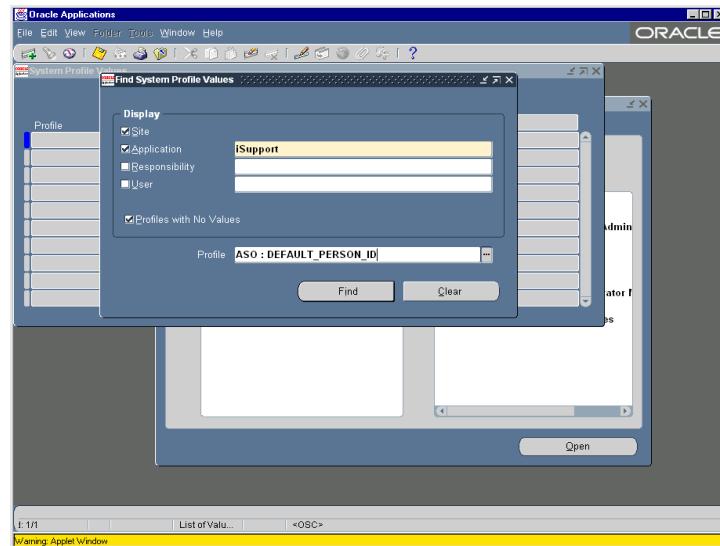
4. Assign site level properties for: COMPANY\_NAME, COMPANY\_ADDRESS, COMPANY\_MERCHANT\_NAME.
5. Setup profile options ASO: DEFAULT Salesrep, ASO: DEFAULT Order Type and SEQUENTIAL NUMBER for Creating Returns.
  - Login into the Oracle Application.
  - Select System Administrator responsibility

## Properties Tab

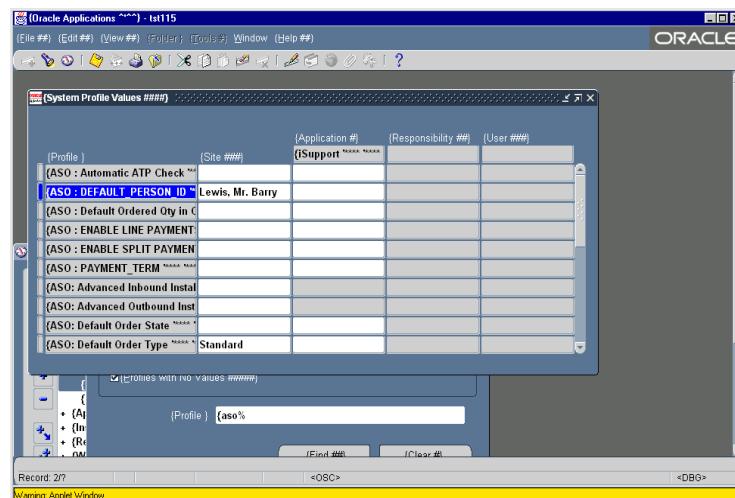
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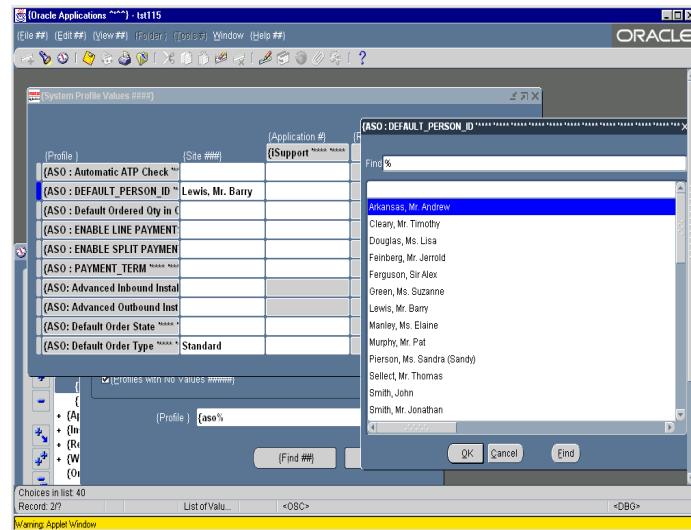


- Select Profile > System On find System Profile Values form select Site and Application checkbox. For application find "iSupport" and find the profile option.



- Find the profile option "ASO:DEFAULT Salesrep" and set it to No Sales Credit at the application level. This represents the default assigned resource for Returns created within iSupport





- Find Profile option ASO:DEFAULT Order Type and set it to Mixed at the application level. This allows specification of a mixed Order that can contain Return and Order lines.
- Profile option SEQUENTIAL NUMBER should be set to "Always Used" at the application level. This allows Orders with multiple lines to be created.

## Installed Base Setup

### Prerequisites

Make sure you set up Installed Base as described in the Implementing Installed Base documentation.

Ensure that all the setup steps have been reviewed and completed as necessary.

## Confirm Setup of Defects

### Prerequisites

Make sure you set up Defects as described in the Implementing Defects documentation.

Ensure that all the setup steps have been reviewed and completed as necessary.



