

Implementation Guide

Release 11*i*

August, 2000

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Contents

Send Us Your Comments	v
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Preface

Intended Audience	vii
Related Documentation	vii

Overview of Oracle *i*Support

A Comprehensive Self-Service Environment	1-1
Service Request Management	1-1
Knowledge Management	1-2
Installed Base	1-4
Email Management	1-4
Interactive Online Forums	1-5
Transactional Inquiries	1-6

Implementation Overview

iSupport Administration Overview	2-1
Personalized Homepage	2-2
Service Request Management	2-2
Call Me	2-3
Feedback/Survey	2-3
Knowledge Base	2-3
Usergroups	2-3
eMail Template	2-3

User Forum	2-4
Setup Flowchart	2-5
iSupport Modules and Dependencies.....	2-6
Setup Checklist.....	2-7

Implementing Oracle iSupport

Creating a System Administration User for iSupport	3-1
Creating a New User	3-1
Associate iSupport System Administrator Role to the User	3-5
Associate iSupport System Administrator responsibility to the user	3-6
Profile Tab	3-10
Defining Personalized Homepage.....	3-10
Selecting Homepage Categories	3-10
Configuring Your Section or Bin	3-12
Setting Up Subscription Information	3-14
Setting Up Subscription Templates	3-14
Setting Email Subscription Intervals	3-14
Support Tab	3-15
Managing Service Requests.....	3-15
Call Me Setup	3-17
Surveys Setup	3-18
Setting Up News Categories.....	3-20
Usergroup Setup	3-21
Email Management Setup.....	3-22
Forums Setup.....	3-24
Managing Categories	3-24
Managing Forums	3-25
Properties Tab.....	3-30
Account Setup (Creating Returns)	3-30
Installed Base Setup	3-34
Confirm Setup of Defects.....	3-34

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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.

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

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

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

Document	Purpose
Implementing Oracle Scripting	Contains information about Scripting, Concepts, Implemenation and configuration
Implementing Oracle Service Core	Contains information about Knowledge Management and Installed Base Implemenation and configuration
Implementing Oracle eMail Center	Contains information about eMail Center, Concepts, Implemenation and configuration

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.

Oracle Applications

ORACLE Home Account My Products Support Forum Quick Links

Ask Me View/Update Requests Create Request Call Me Patch Search Survey

Quick Find: Service Requests Go

Self Support

Frequently Used Solutions Technical Library

Employee [Dropdown]

Document No. [Text Box]

Keywords [Text Box]

☒ Troubleshooting Solutions [Advanced Search](#)

☒ Documents, FAQs, etc.

Go! Clear

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

Oracle Applications

ORACLE Home Account My Products Support Forum Quick Links

Quick Find: Service Requests Go

Search Result

Frequently Used Solutions Technical Library

Troubleshooting Solutions

Score	Description
36	Cannot Access Floppy Disk Drives after Changing Drive
12	Troubleshooting DMF Floppy Disks
12	Toshiba laptop does not recognize floppy disk when installed
6	Windows 95 Err Msg w/a DISTEC Drive: Missing Operating System

Refine Search Criteria

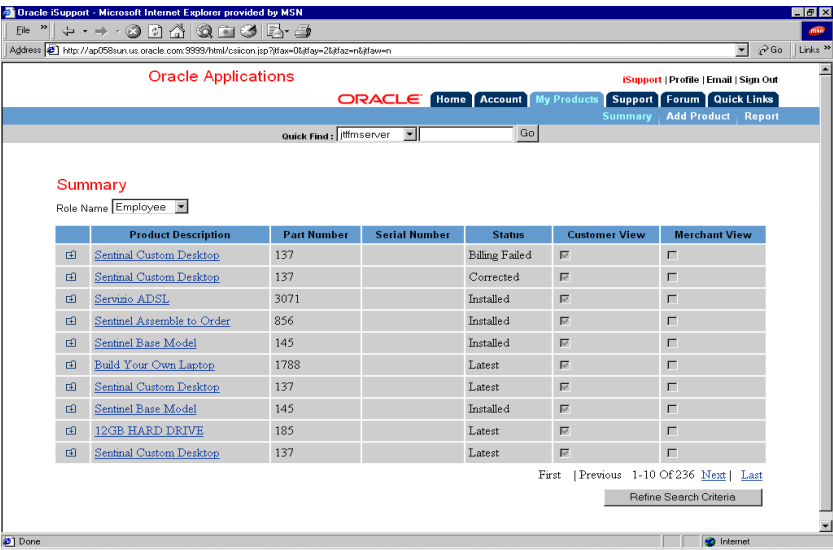
First | Previous 1-4 of 4 Next | Last

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.



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.

iSupport iSupport | Profile | Email | Help | Sign Out

ORACLE [Home](#) [Account](#) [My Products](#) [Support](#) [Forum](#) [Quick Links](#)

[Ask Me](#) [View/Update Requests](#) [Create Request](#) [Call Me](#) [Patch Search](#) [Survey](#)

Quick Find:

Category Listing [Top Forum Page](#)

Role Name:

	Category Name	Creation Date	Author
	Windows 200 Update	1999-11-13 16:01	1
	Microsoft Windows 2000 Discussion	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

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.

iSupport

[Register](#) / [Profile](#) / [Email](#) / [Help](#) / [Signout](#)

ORACLE

Home

Account

My Products

Support

Forum

Information

Orders

Invoices

Contracts

Returns

Service Requests

Defects

Quick Find

Orders

Go

Advanced Search

Outstanding Orders

History

View

My Orders

Date	Number	Currency	Amount	Order Status
11/15/1999	88765	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

<<First <Previous 1-10 out of 10 Next> Last>>

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

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.

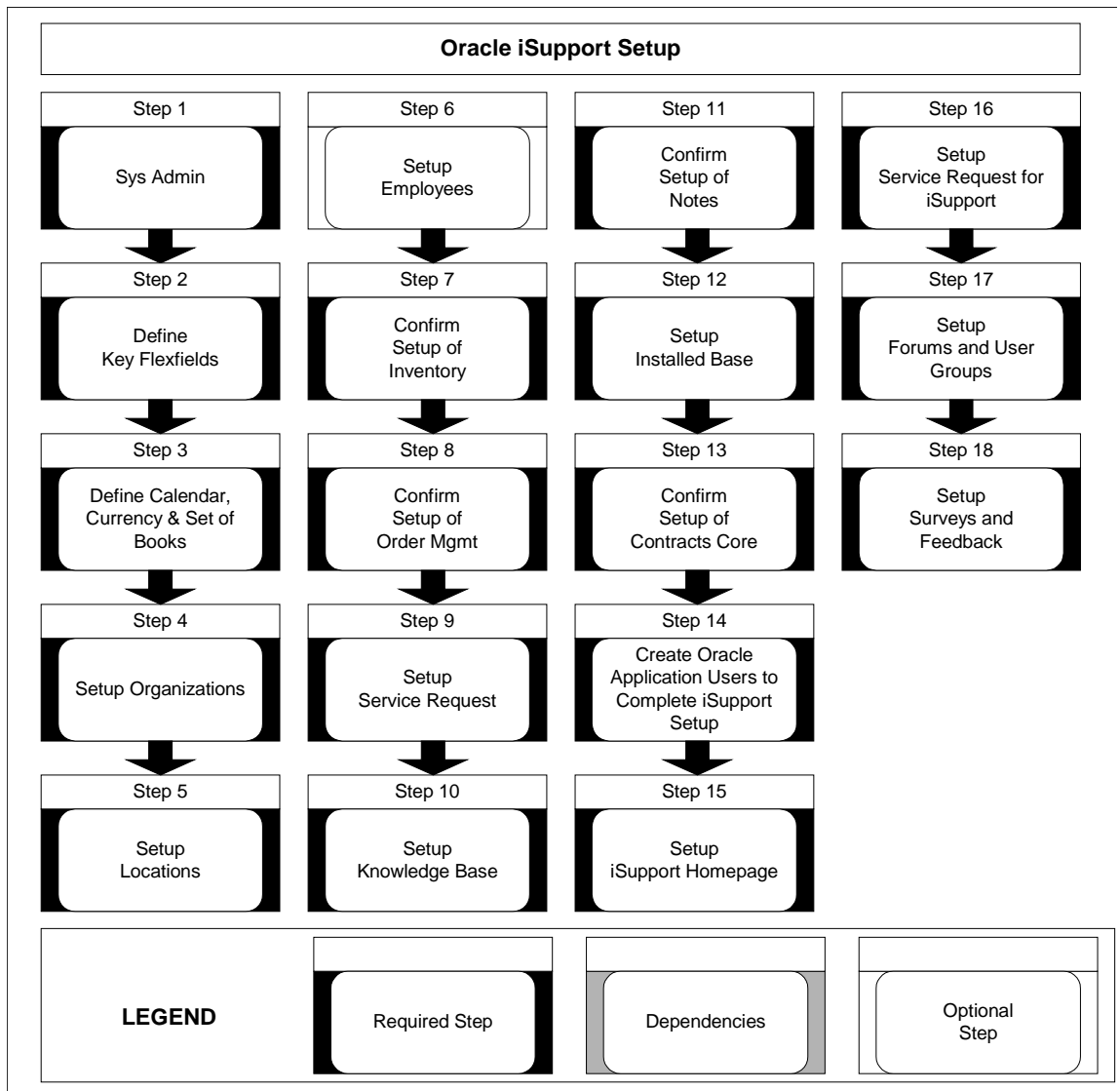
User Forum

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.

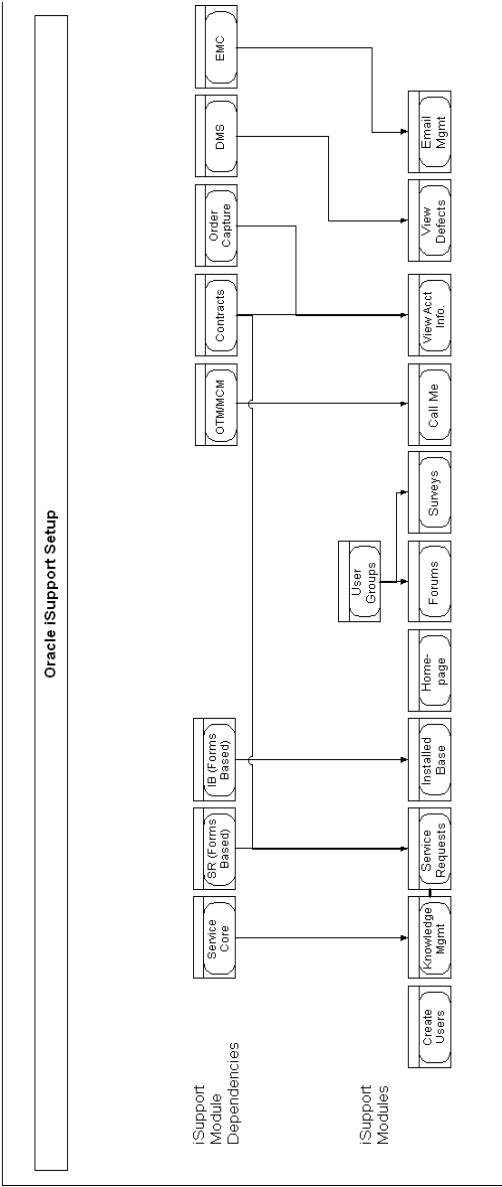
Using Forum Administration, you can set up and manage forums for a particular customer or usergroup(s).

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

Implementing Oracle *i*Support

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

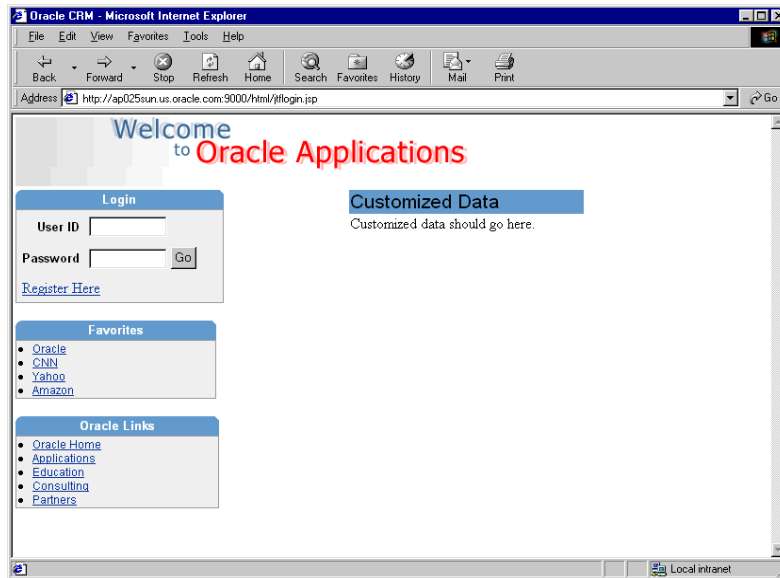
Use this procedure to create a new user

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.

The screenshot shows a web browser window titled "User Registration - Microsoft Internet Explorer". The address bar displays the URL: <http://ap025sun.us.oracle.com:9000/html/fttreg1.jsp?target=ftlogin.jsp>. The main content area is titled "User Registration" in red text. Below the title is a registration form with the following fields and labels:

- * First Name: John
- * Last Name: Doe
- * UserName: johndoe
- * Password: [masked]
- * Verify Password: [masked]
- * Email: johndoe@us
- Account Type: Business User (dropdown menu)

Below the form, there are two lines of asterisked text:

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

At the bottom of the form are two buttons: "Submit" and "Clear". The browser's status bar at the bottom shows "Done" and "Local intranet".

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.

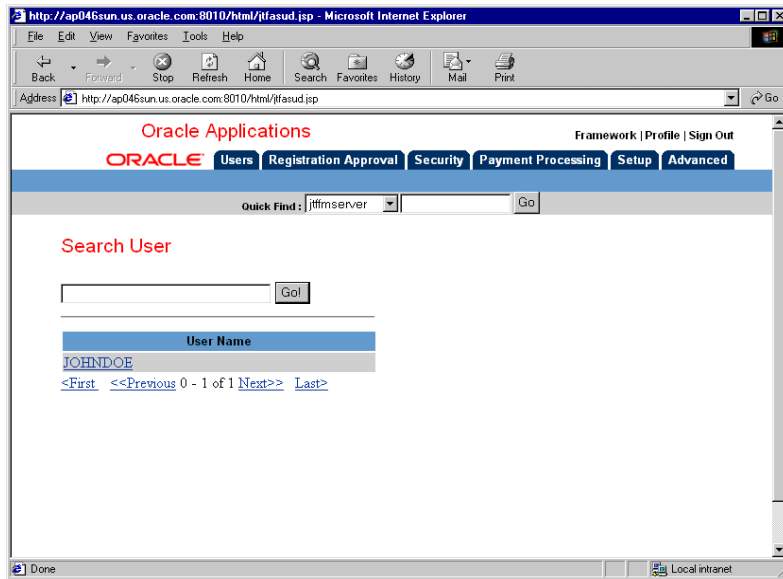
Associate iSupport System Administrator Role to the User

Prerequisites

New user has been created

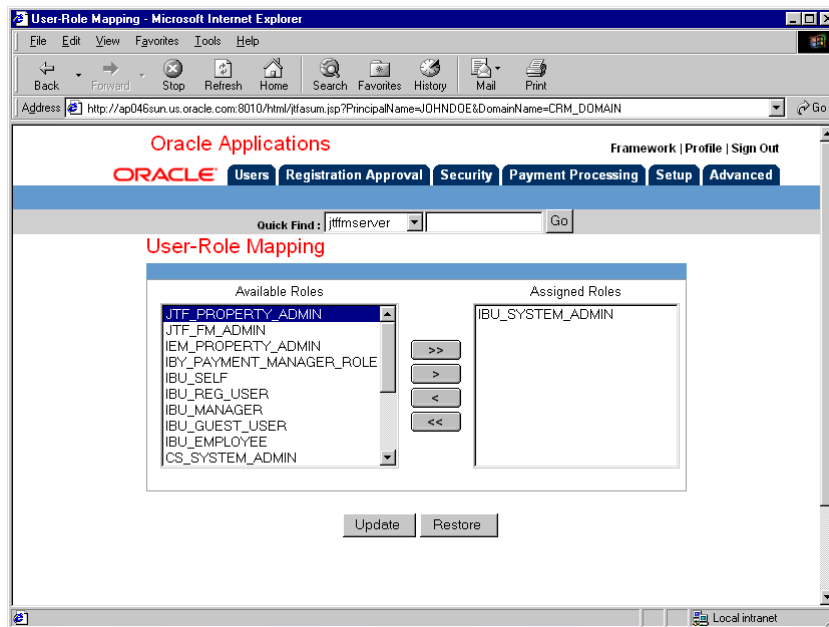
Steps

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.

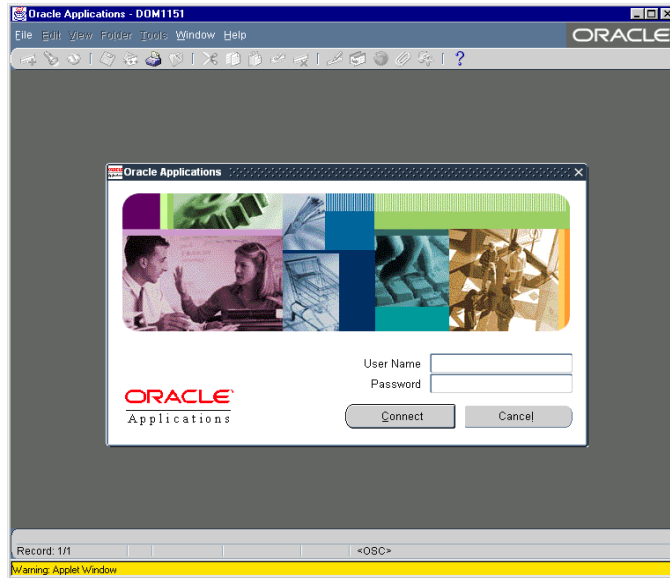
Associate iSupport System Administrator responsibility to the user

Prerequisites

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

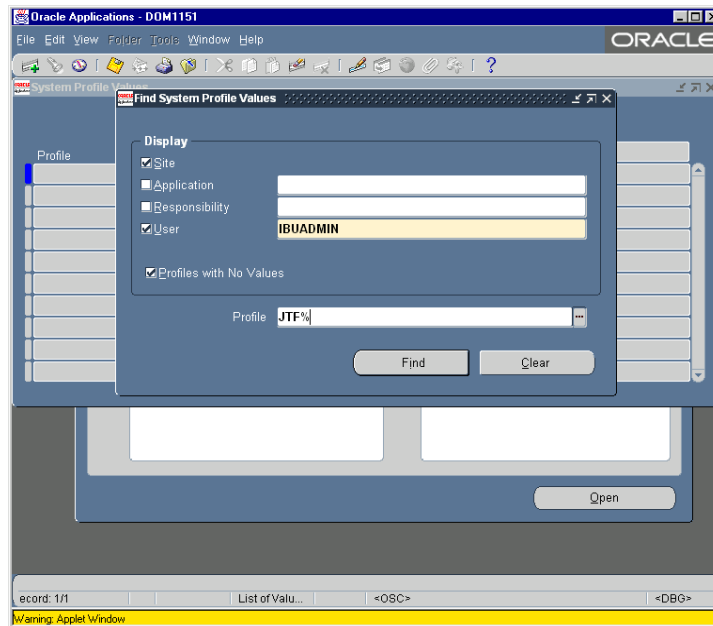
Steps

1. Login to Oracle Applications.



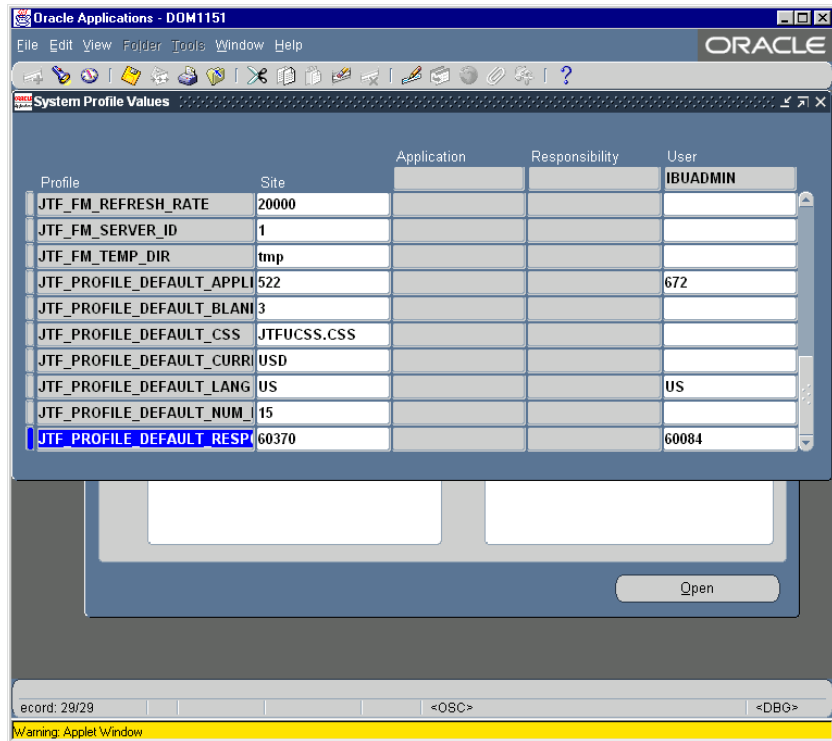
2. Select "System Administrator" responsibility.

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 need 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)

Profile Option	Purpose
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

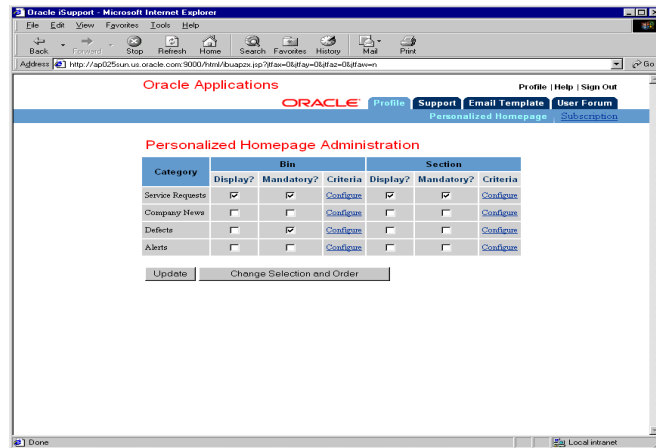
Use this procedure to define sections.

Prerequisites

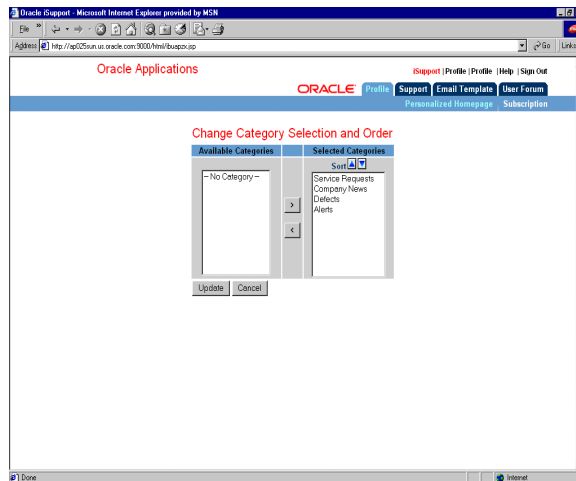
None

Steps

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



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



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.

Oracle Applications

Profile | Support | Email Template | User Forum | Properties | Personalized Homepage | Subscription

Configuring Bin

☐ Display
☒ Mandatory

Defect No.

Date Created

Summary

Severity

Status

Last Updated

Sorted By

Number of Rows

Role Name

Please select the columns which you would like to hide:

☒ Defect Number
☐ Creation Date
☐ Last Update
☐ Summary
☐ Severity
☐ Status

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

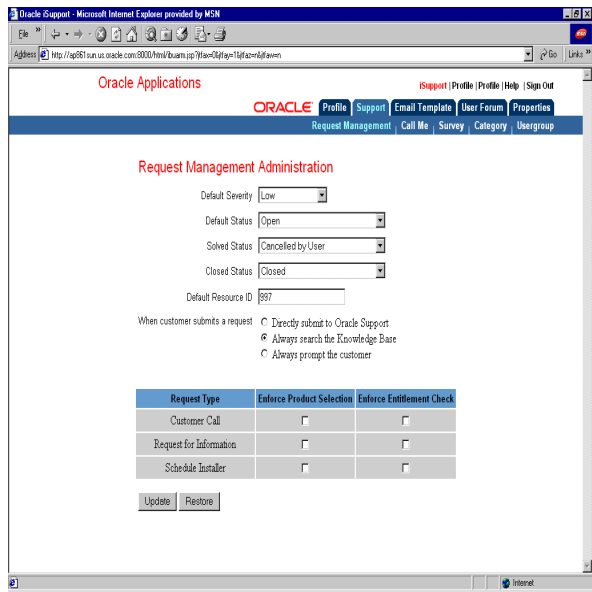
Make sure you set up Service Request as described in the implementing section of Oracle Service Request Documentation.

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 to the service request routed, choose an appropriate radio button.

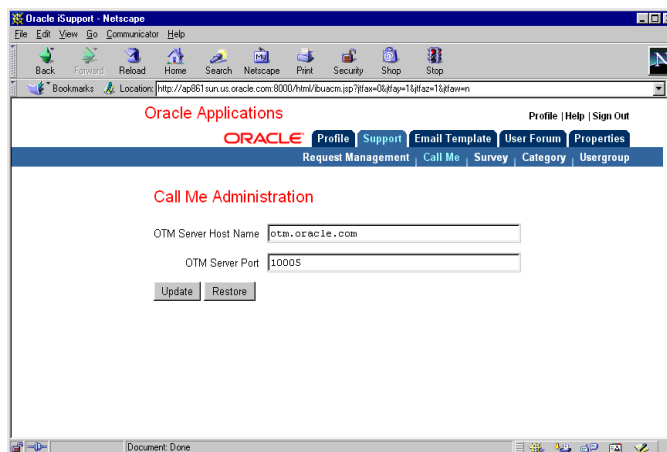
Call Me Setup

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

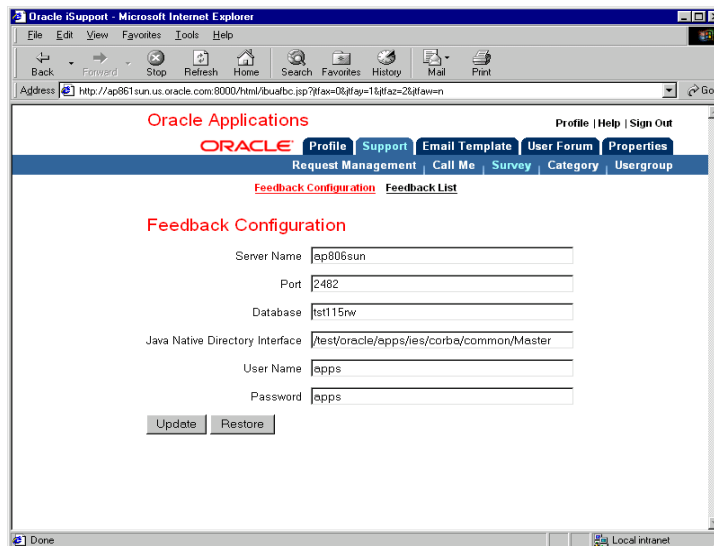
Use the Survey tab to set up feedback templates so customers can provide feedback on certain topics or sections of iSupport. You can also assign a feedback template to one or more user groups. Use this procedure to set up the feedback option for your customers.

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

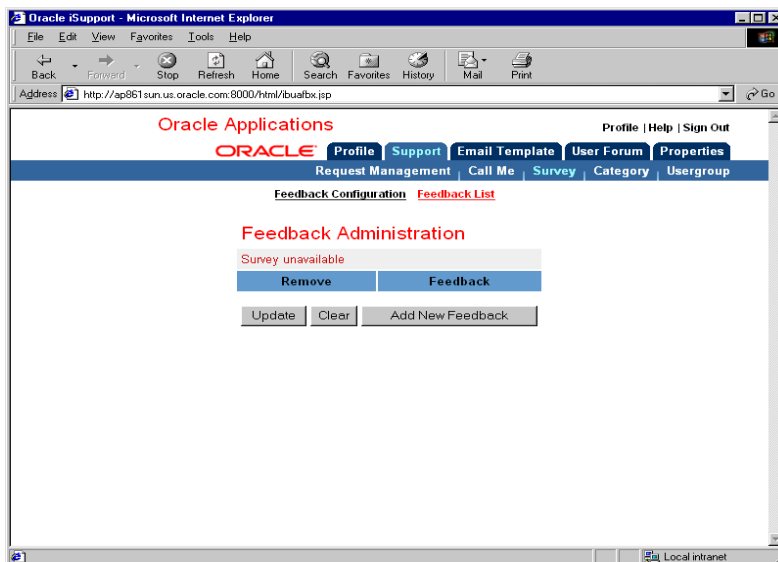


The screenshot shows a web browser window titled "Oracle iSupport - Microsoft Internet Explorer". The address bar displays the URL: `http://ap861sun.us.oracle.com:8000/html/buatbc.jsp?ifax=0&fay=1&fsc=2&faw=n`. The page content includes the "Oracle Applications" header with navigation tabs for Profile, Support, Email Template, User Forum, and Properties. Below this is a sub-navigation bar with Request Management, Call Me, Survey, Category, and Usergroup. The "Feedback Configuration" link is highlighted. The main content area, titled "Feedback Configuration", contains several text input fields: "Server Name" (value: ap806sun), "Port" (value: 2482), "Database" (value: tst115nw), "Java Native Directory Interface" (value: /test/oracle/apps/ies/corba/common/Master), "User Name" (value: apps), and "Password" (value: apps). At the bottom of the form are "Update" and "Restore" buttons. The status bar at the bottom of the browser window shows "Done" and "Local intranet".

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.

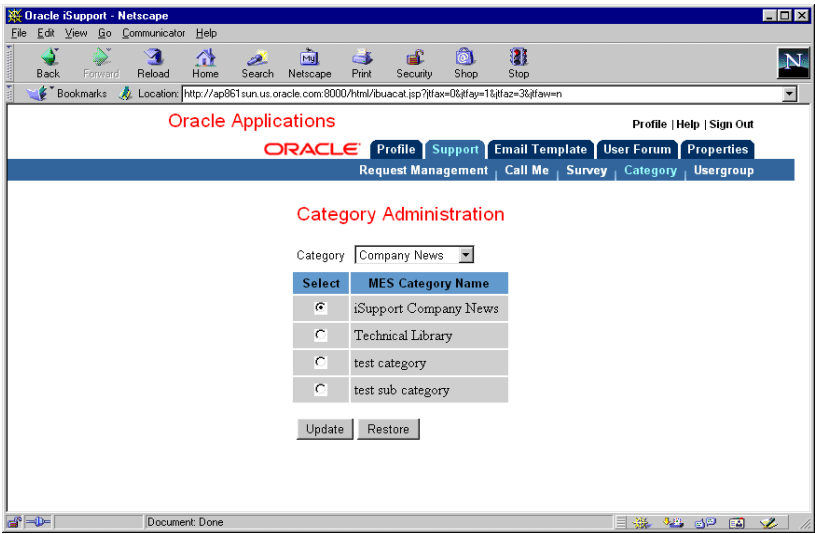
Ensure that all the following steps have been reviewed and completed as necessary:

- 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

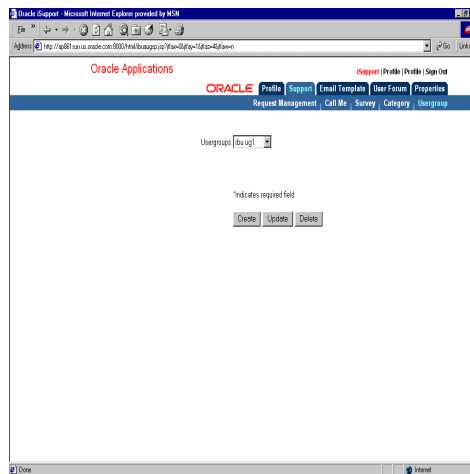
Use this procedure to create Usergroups

Prerequisites

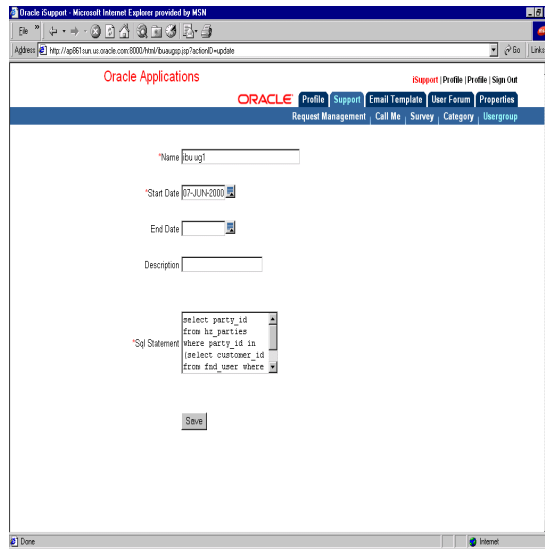
Users have been created

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"



The screenshot shows a web browser window titled "Oracle Support - Microsoft Internet Explorer provided by MSN". The address bar shows "http://ap8611sun.us.oracle.com:8000/html/ibuggo.jsp?actionID=update". The page header includes "Oracle Applications" and a navigation bar with links: "iSupport", "Profile", "Sign Out", "Email Template", "User Forum", "Properties", "Request Management", "Call Me", "Survey", "Category", and "Usergroup". The main form contains the following fields:

- *Name:
- *Start Date:
- End Date:
- Description:
- *Sql Statement:

```
select party_id  
from hr_parties  
where party_id in  
(select customer_id  
from fnd_user where
```
- Save:

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

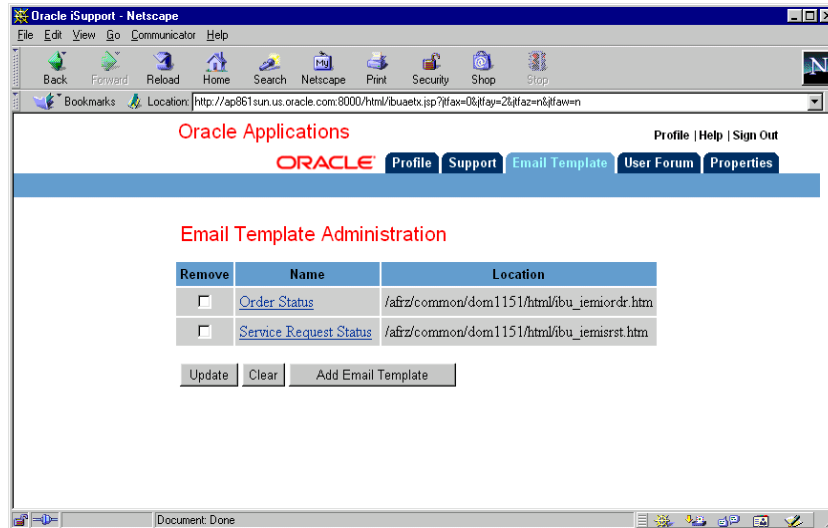
Use the procedure to set up templates for your customers. You can remove existing templates or add a template. Note: Oracle Email Center setup needs to be confirmed before iSupport can provide any email template functionality.

Prerequisites

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

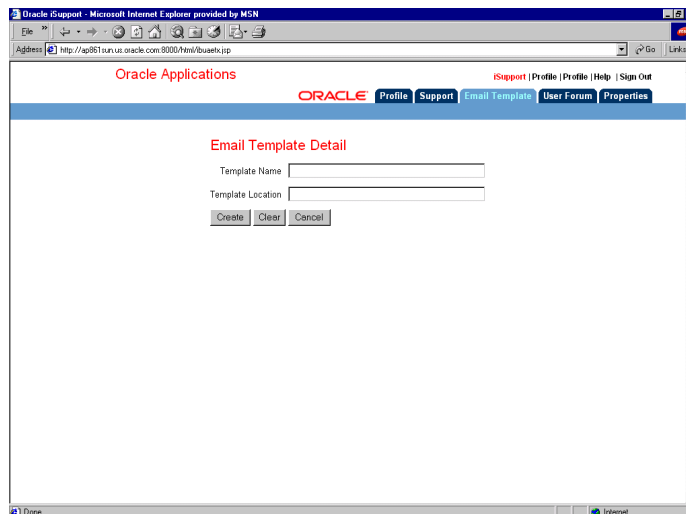
Steps

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 a 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.

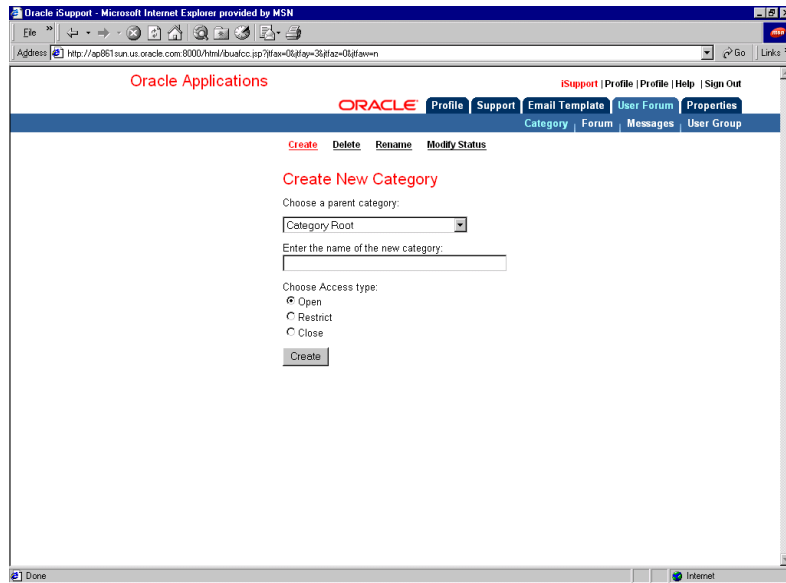
Prerequisites

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

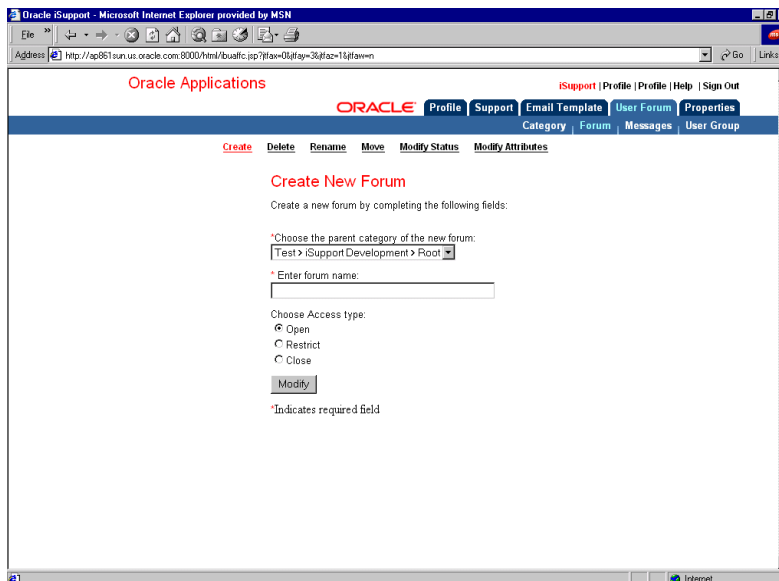
Use this procedure to create a new forum.

Prerequisites

None

Steps

1. Select the Create Forum link.



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 mandator 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.

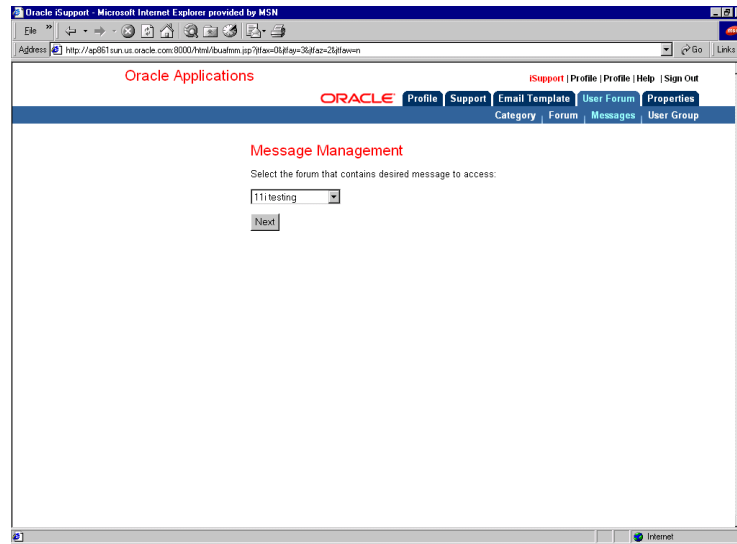
Prerequisites

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

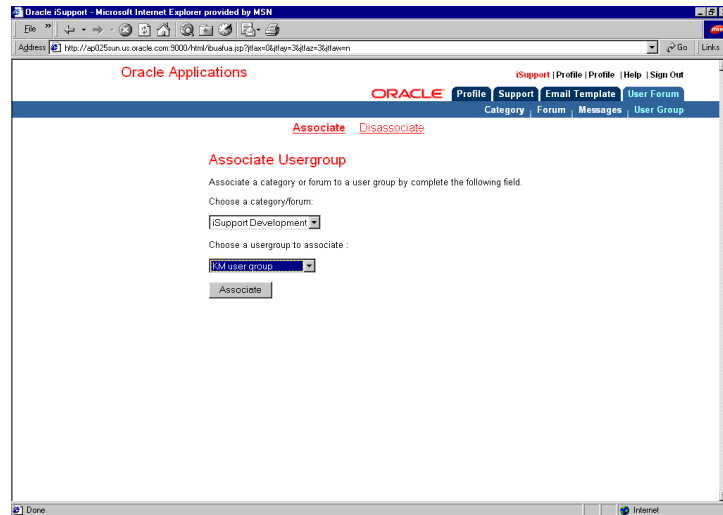
Use this procedure to associate a user group with a forum.

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

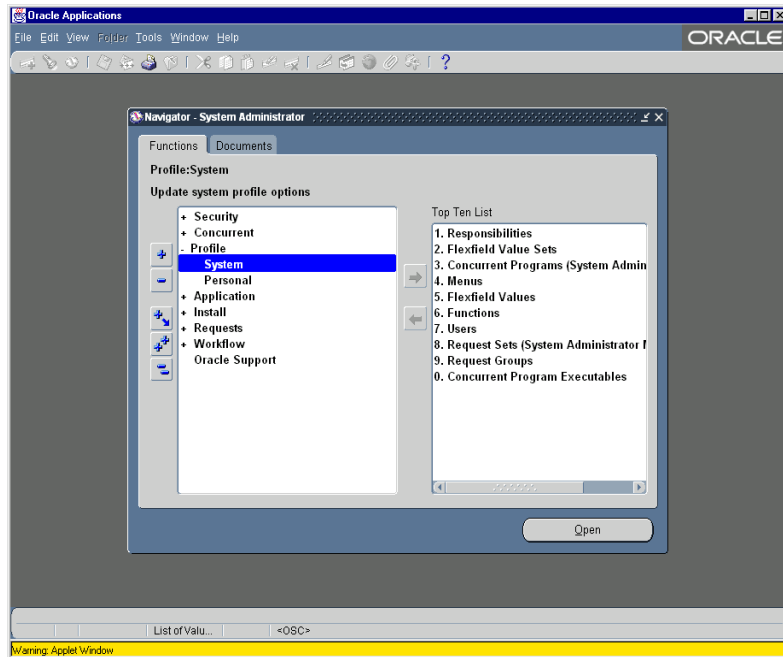
None.

Steps

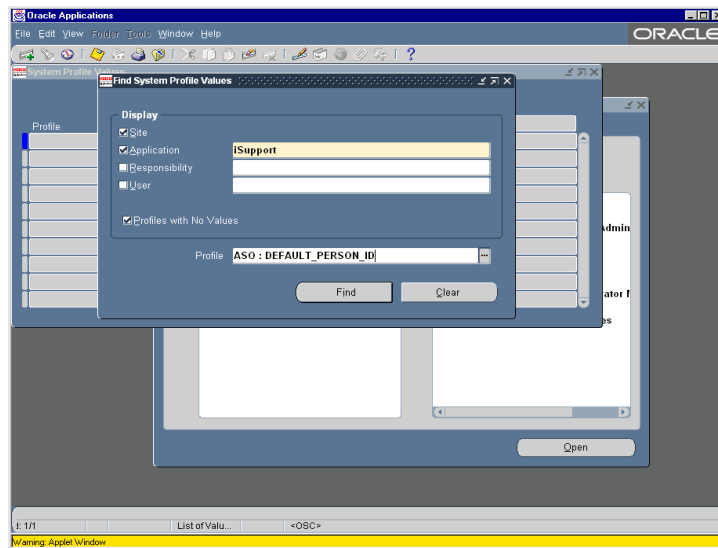
1. Login into CRM System Administration as sysadmin/sysadmin
2. Select the advanced tab
3. Choose IBU view



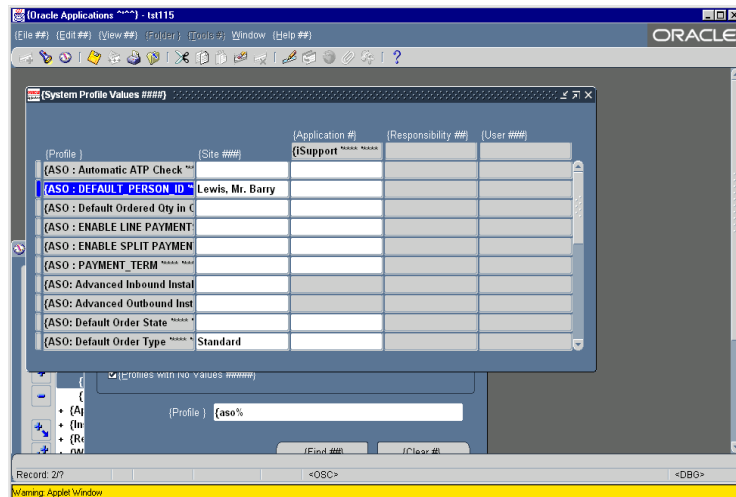
4. Assign site level properties for: COMPANY_NAME, COMPANY_ADDRESS, COMPANY_MERCHANT_NAME.
5. Setup profile options ASO: DEFAULT Salesrep, ASO: DEFAULT Order Type and SEQUENTIAL NUMBER for Creating Returns.
 - Login into the Oracle Application.
 - Select System Administrator responsibility

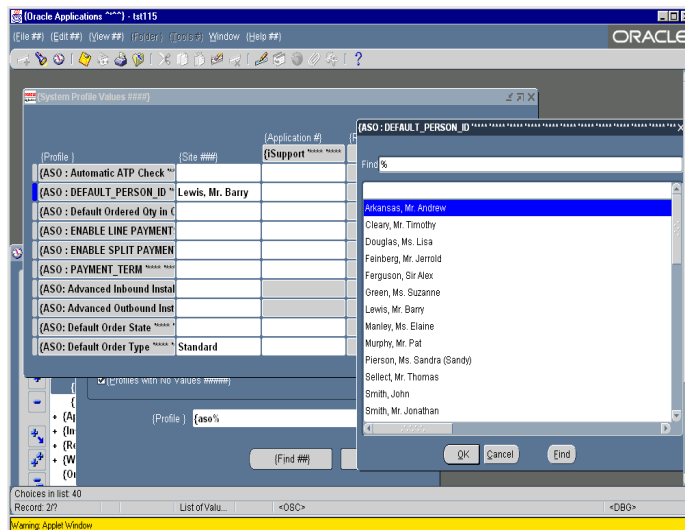


- Select Profile > System On find System Profile Values form select Site and Application checkbox. For application find "iSupport" and find the profile option.



- 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.

