Oracle® *i*Support

Implementation Guide

Release 11*i*

November, 2000

Part No. A86192-02

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Oracle *i*Support Implementation Guide, Release 11*i*

Part No. A86192-02

Contents

Implementing Oracle iSupport

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Oracle iSupport Implementation Guide, Release 11i

A86192-02

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  USA

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

Preface

This manual describes the implementation and administration of Oracle iSupport, Release 11.5.3

Intended Audience

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

We recommend you have experience in database administration.

Related Documentation

This manual makes references to other implemnetion guides, You may also wish to consult the following documenation:

- *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, Implemenation and configuration
Implementing Oracle Telephony Manager	Contains information about Telephony Manager, Concepts, Implemenation 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 *i*Support

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.
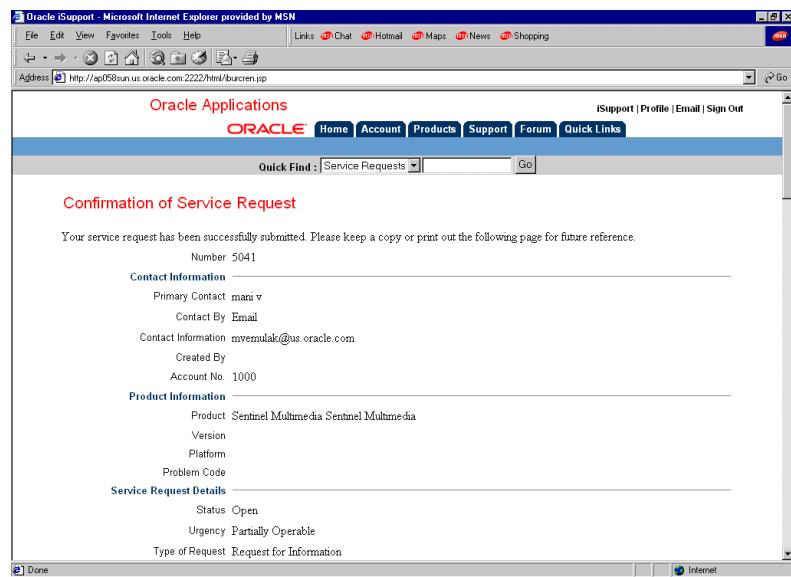
Knowledge Management

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.

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.

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.

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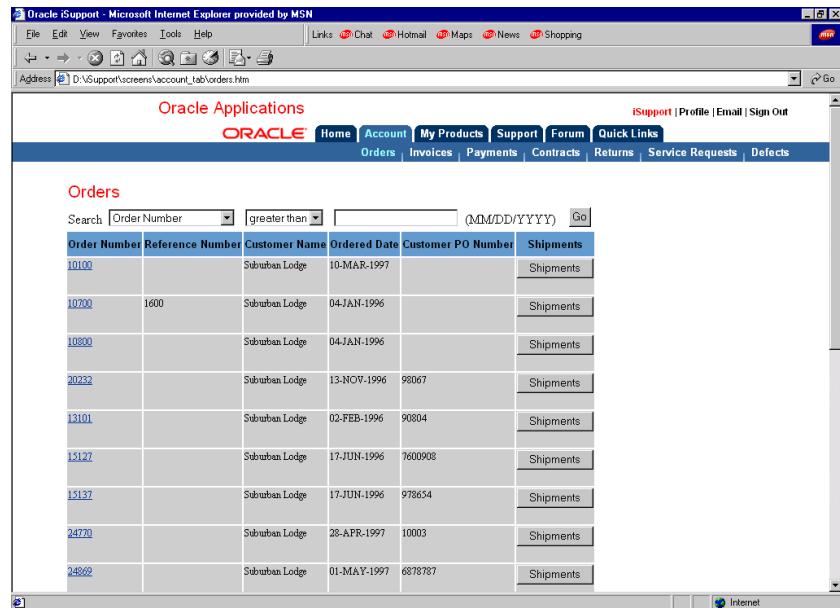
This section provides overviews of the Oracle iSupport application and its administration components, as well as iSupport's relationship to other Oracle Applications.

*i*Support 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:

Oracle iSupport Setup			
Step 1 Sys Admin	**Step 6** Setup Employees	**Step 11** Confirm Setup of Notes	**Step 16** Setup Service Request for iSupport
Step 2 Define Key Flexfields	**Step 7** Confirm Setup of Inventory	**Step 12** Setup Installed Base	**Step 17** Setup Forums and User Groups
Step 3 Define Calendar, Currency & Set of Books	**Step 8** Confirm Setup of Order Mgmt	**Step 13** Confirm Setup of Contracts Core	**Step 18** Setup Surveys and Feedback
Step 4 Setup Organizations	**Step 9** Setup Service Request	**Step 14** Create Oracle Application Users to Complete iSupport Setup	
Step 5 Setup Locations	**Step 10** Setup Knowledge Base	**Step 15** Setup iSupport Homepage	
LEGEND	Required Step	Dependencies	Optional Step

*i*Support Modules and Dependencies
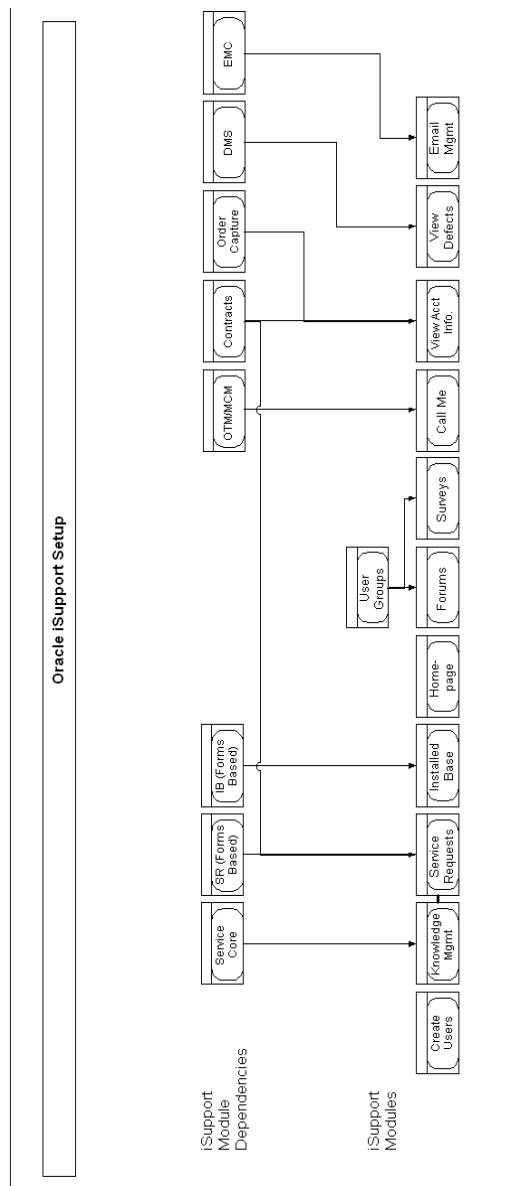
Setup Checklist

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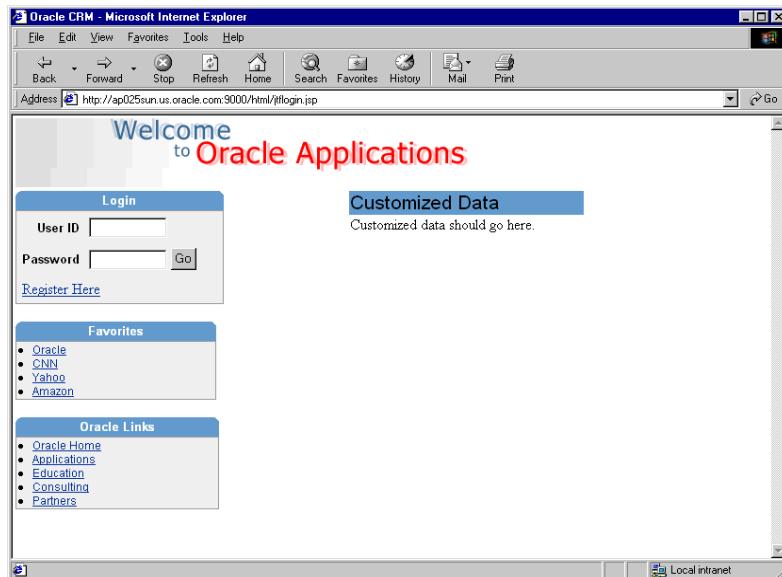
2. Click the "Register here" link, which will bring you to the self-registration page

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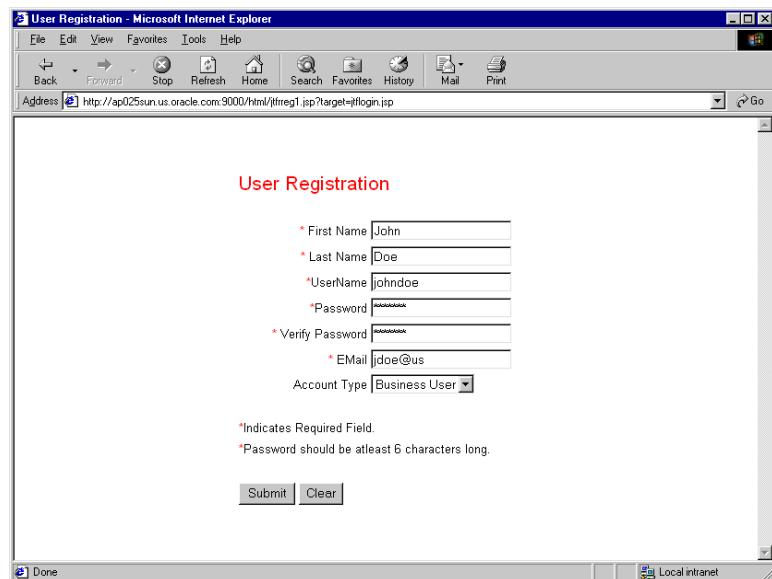
Enter user's first name, last name, username, password, email address, and select "Business User" or "End User". A "Business User" belongs to a company and an "End User" is a single end user.

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.

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.
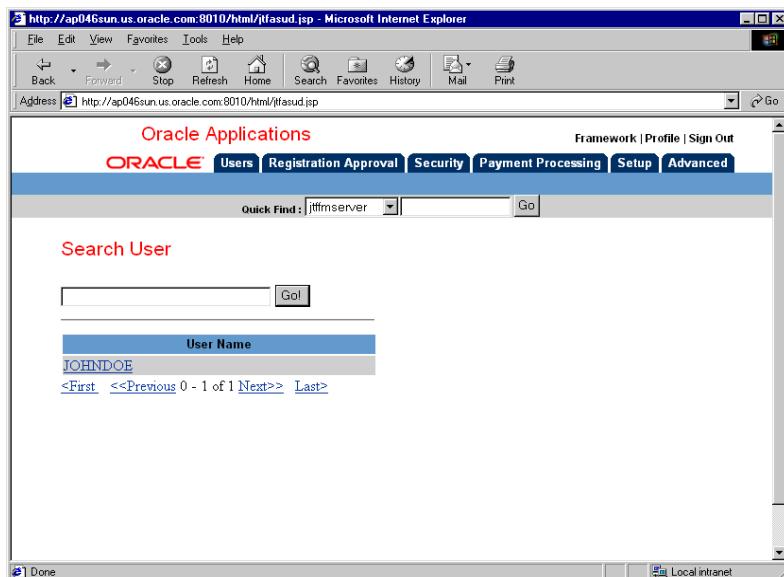
4. The merchant must assign roles to the user. At a minimum "IBU_SYSTEM_ ADMIN" role must be assigned for iSupport system administrator privileges.

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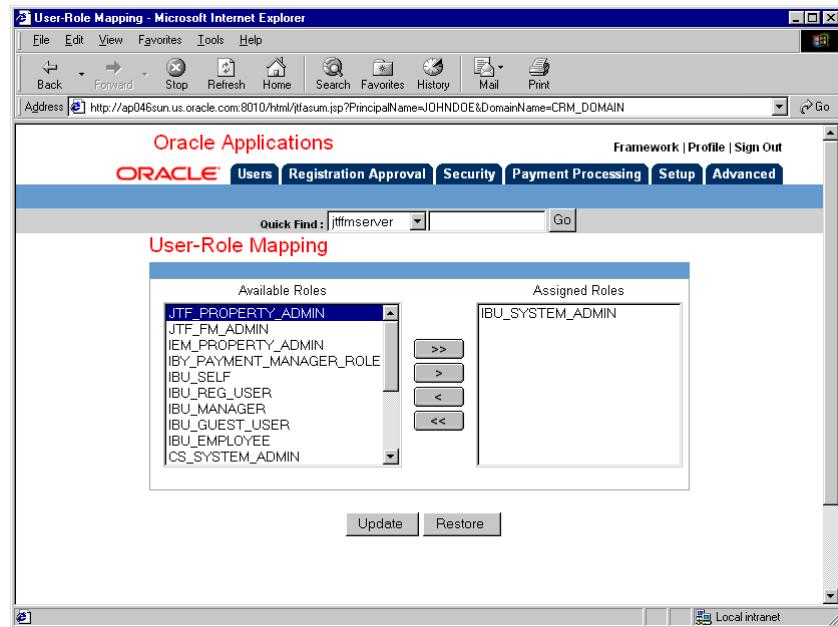
Selected roles should then appeared in the "Assigned Roles" list box. Click Update button to save changes.

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.
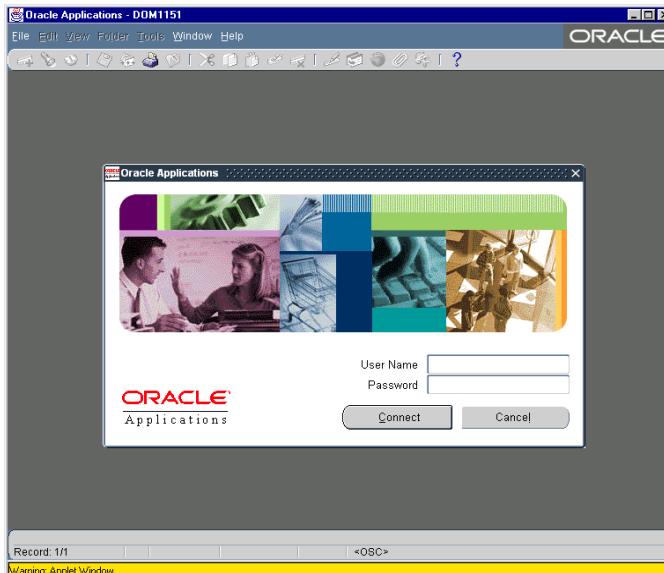
2. Select "System Administrator" responsibility.

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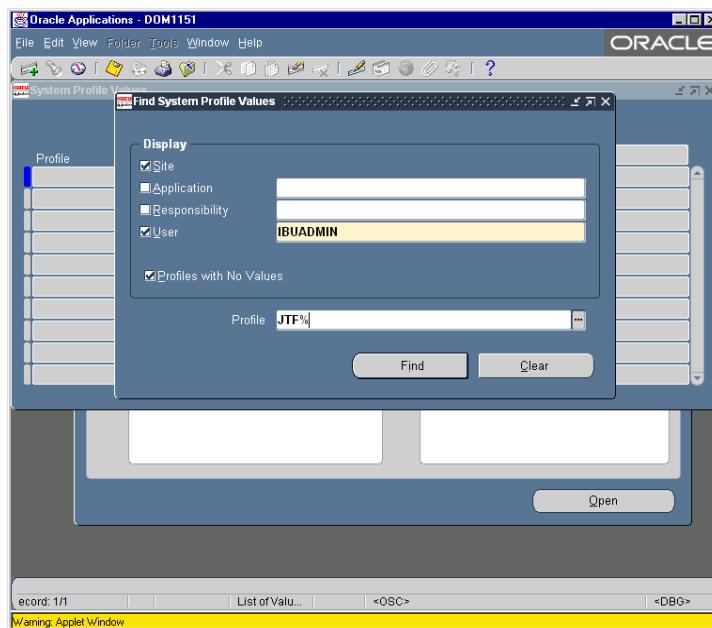
Check the "User" checkbox, enter the username that you just created. To refine the search criteria, enter "JTF%" in the Profile box. This will reduce the search result to system profiles that belong to JTF.

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

- JTF_PROFILE_DEFAULT_APPLICATION
- JTF_PROFILE_DEFAULT_RESPONSIBILITY
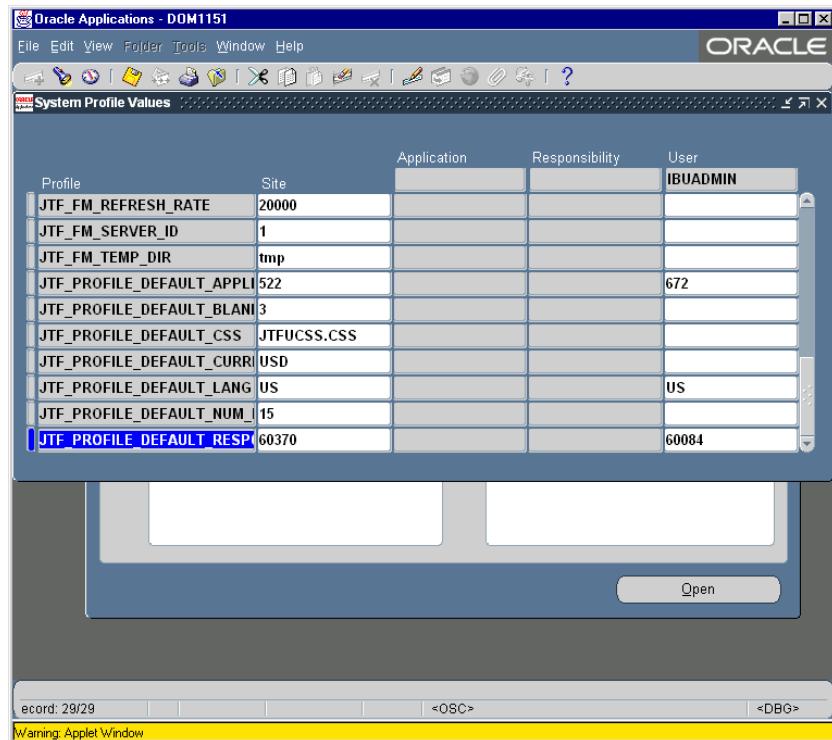
Note: JTF_PROFILE_DEFAULT_APPLICATION specifies the default application for the user. JTF_PROFILE_DEFAULT_RESPONSIBILITY specifies the default application menu structure for the user. The merchant must confirm and assign both these system profile values. The following steps outline a possible process 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)

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 content you want to make available to users, which content is mandatory and so on.

## Selecting Homepage Content

Use this procedure to define content.

Prerequisites

None

Steps

1. Navigate to iSupport Administration. Select the Profile tab and then the Personalized Homepage sub tab. The Content Administration page appears.

2. Select the content you want to make available to your customers by checking the check box. By default, there are four seeded contents displayed on the Homepage:
    - Default Account
    - How can we help you?
    - Service Requests
    - Alerts

    These are seeded as non-mandatory, non-disabled contents. MES Content, for example Company News, is not seeded.

3. Click **Add Content** to add new non-MES content.
    You must specify:
    - The content name
    - Format (wide or narrow)
    - PL/SQL package name or Java object path which provides the content information
    - Mandatory / disabled display for content
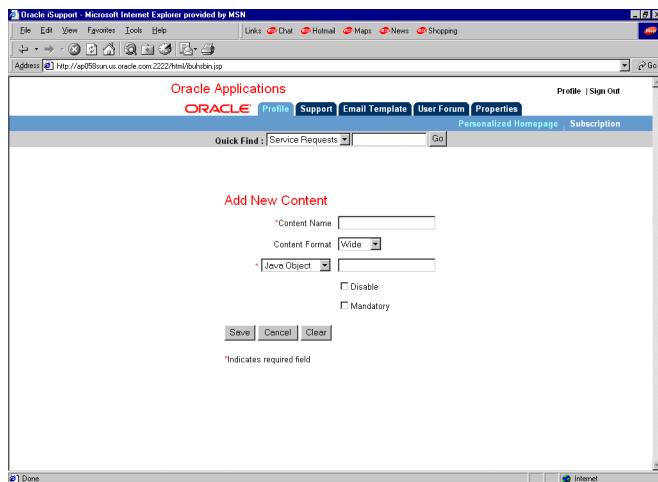
The merchant must provide a valid PL/SQL package (compiled in the database) or a Java class which adheres to the standard interface, i.e. provides an API to retrieve:
- The content name (which should be translatable)
- The content HTML string (which should contains a HTML table which has the content information. The Java interface is BinInterface, and the Javadoc is provided)
- Email text if it's a PL/SQL package

If the content needs to have some edit functionality for customers to use, then the merchant should provide the "Edit" link or button in the returned content HTML. Clicking on this link will go to an "Edit content" JSP page that the merchant should also provide.

Checking the "Mandatory" checkbox will not allow the users to personalize this content, i.e. it will always show up on the customers homepage at a fixed location. Checking "Disable" will diable this content.

4. Click **Add MES Content** to add MES content to the Homepage.
   Select one or more available MES categories and then click on the "Save" button. The default attributes for a MES content are: narrow, non-disabled and

non-mandatory.
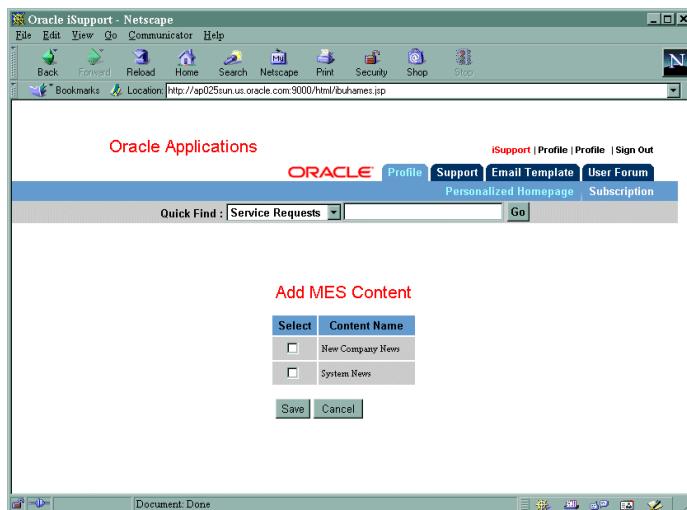
Updating Homepage Content

Use this procedure to update Homepage content.

Prerequisites

None

Steps

1. Navigate to iSupport Administration. Select the Profile tab and then the Personalized Homepage sub tab. The Content Administration page appears.

Click the Content name link for which you want to update
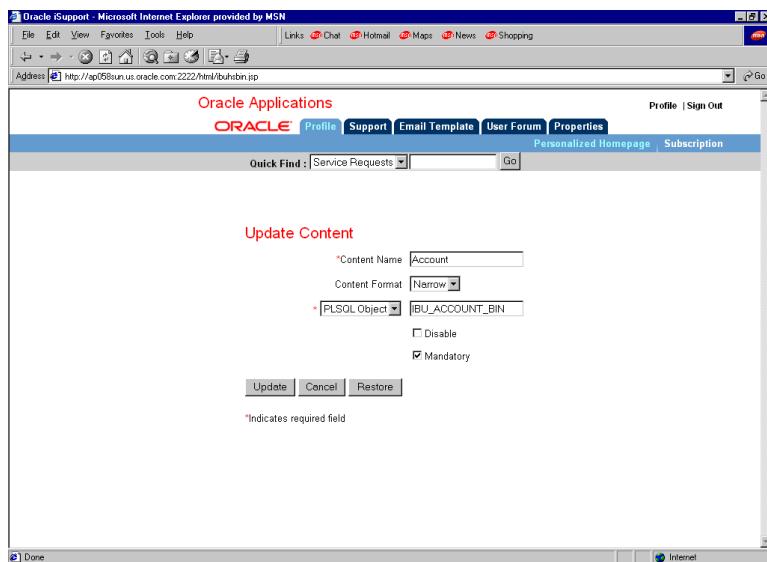

For non-MES content, all the attributes can be updated, including content name, content format, PL/SQL and Java object, mandatory and disable flag. For MES content, only the content format, mandatory and disable flag can be updated.

2. To change the layout for all the mandatory and non-disabled contents, click the **Mandatory Layout** link from the Content Administration page.
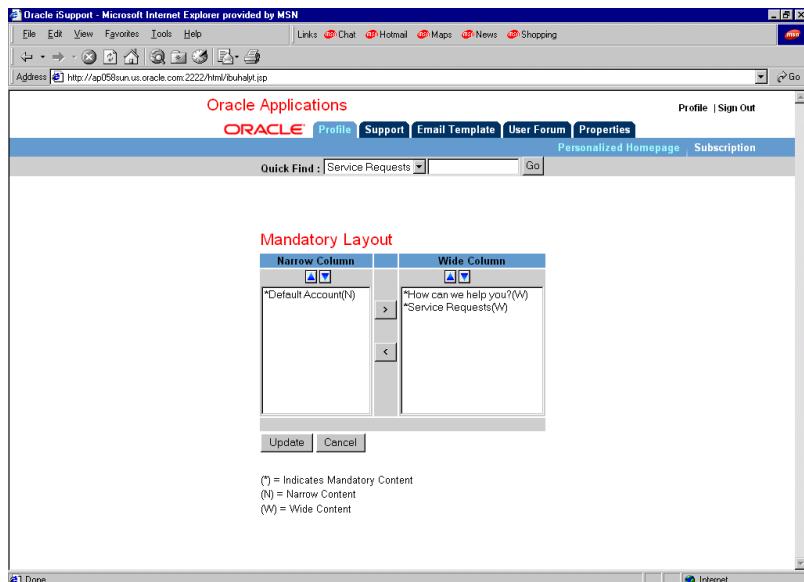
The first column is a narrow column and the second column is wide column. The location of content can be changed by clicking on the left, right, up and down buttons. Content that is defined as narrow format can be moved into wide column, but not vice versa.

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
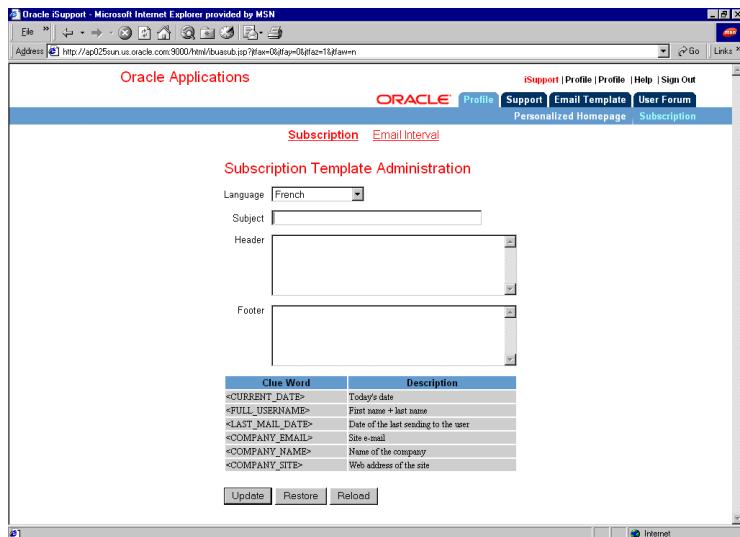
Steps

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.
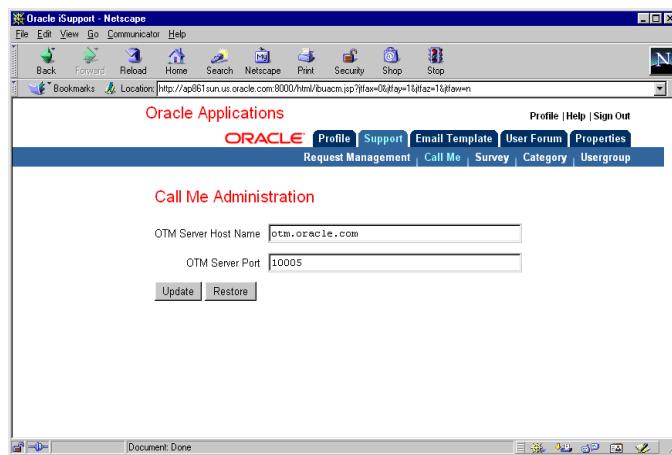
Surveys Setup

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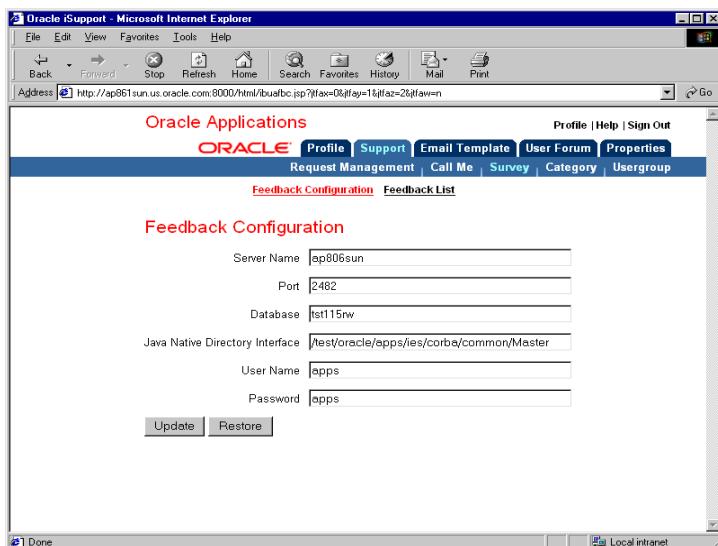
4. Enter server, database, user name, and password information.

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
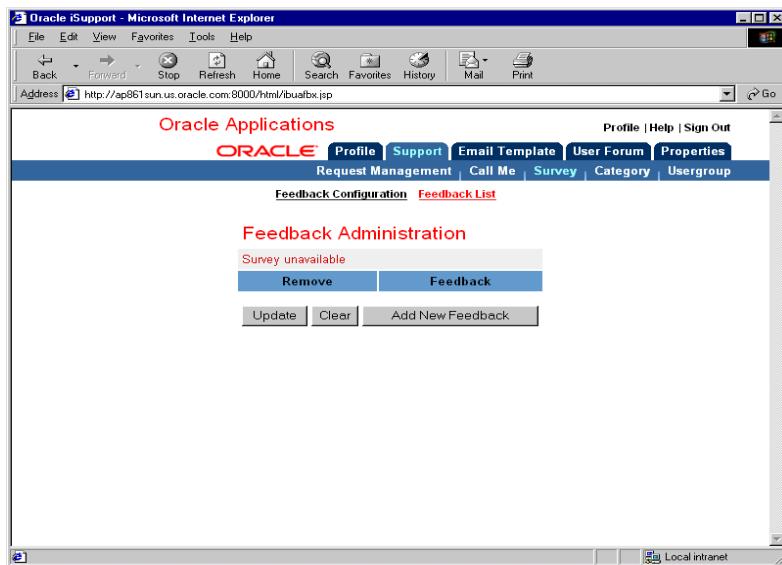
7. Select a predefined feedback name from the feedback list.

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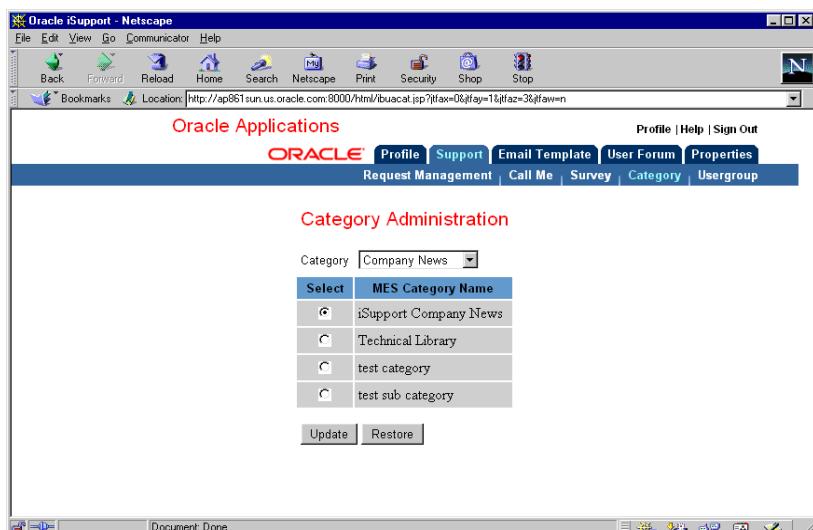
3. Choose the categories you want to add to a customer's company news section.

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 ...."
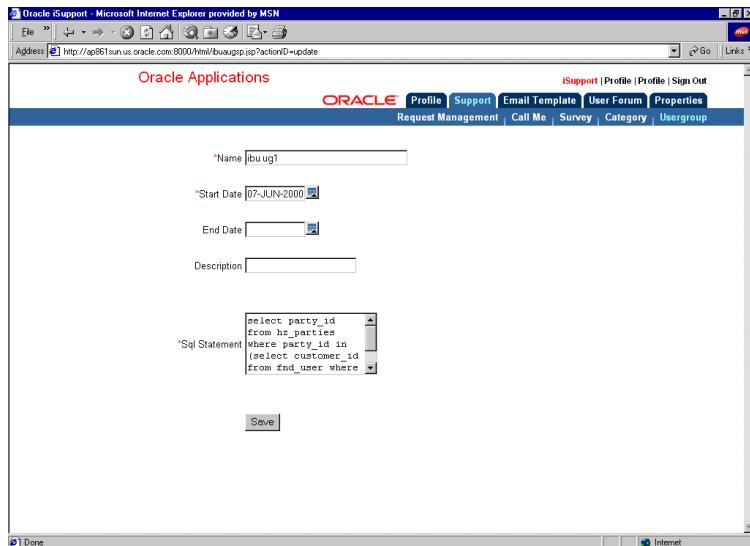
5. Save

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.
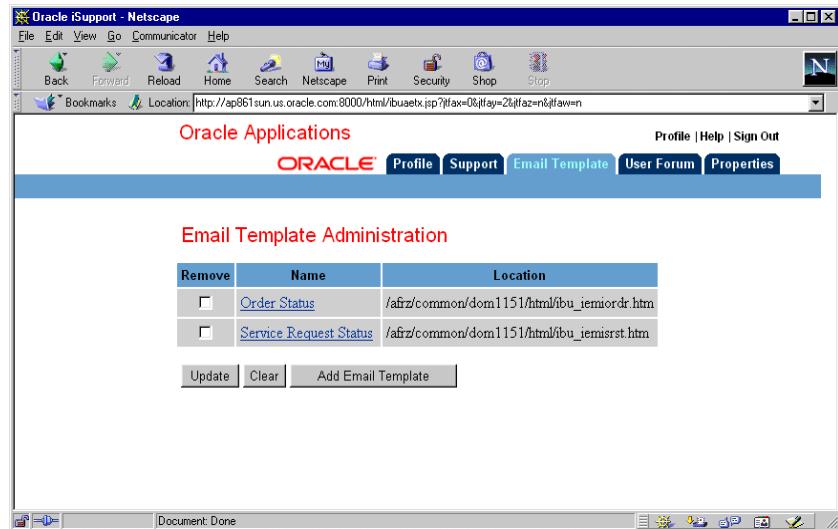
3. To remove a template, select the template by checking the respective check box and click the **Update** button.

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.
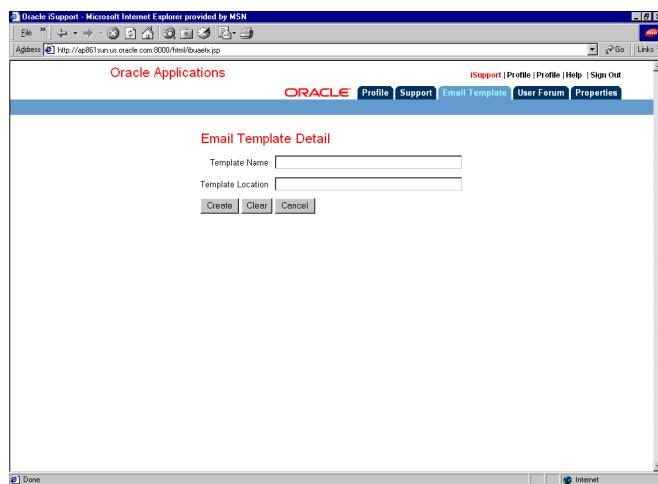
Forums Setup

Use the Forums tab to manage Forums

Managing Categories

Forums are contained within 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**. You 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.
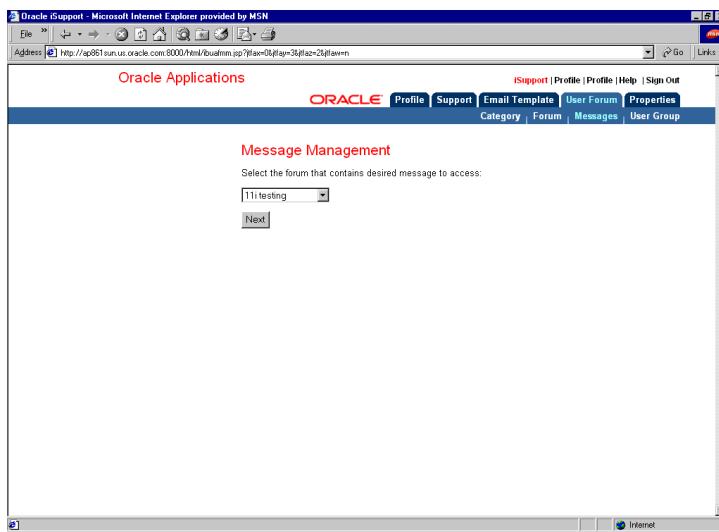
3. From the drop-down list, select the forum for the message you want to move.

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
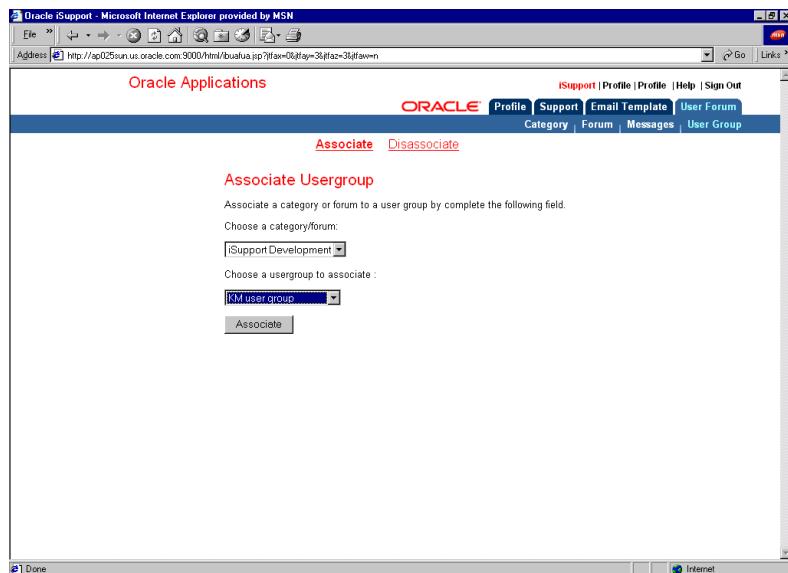
2. From the drop-down list, choose a category.

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
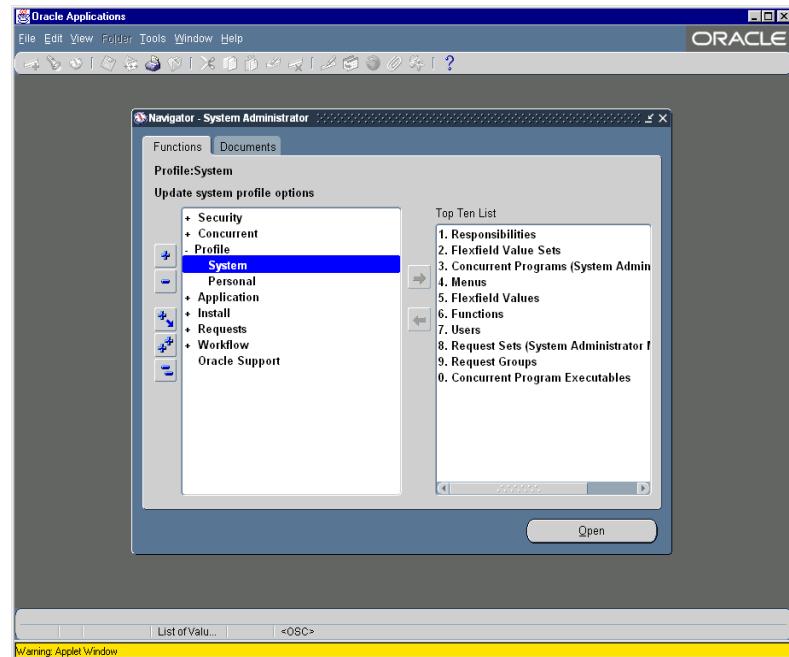
- Select Profile > System On find System Profile Values form select Site and Application checkbox. For application find "iSupport" and find the profile option.
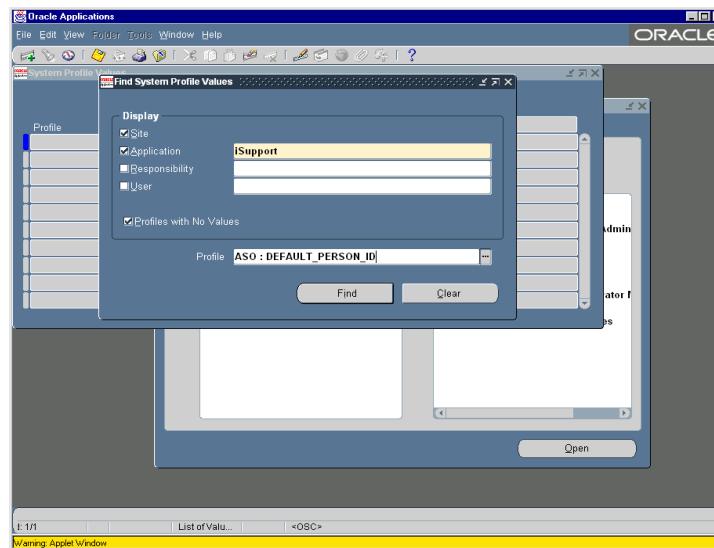
- Find the profile option "ASO:DEFAULT Salesrep" and set it to No Sales Credit at the application level. This represents the default assigned resource for Returns created within iSupport
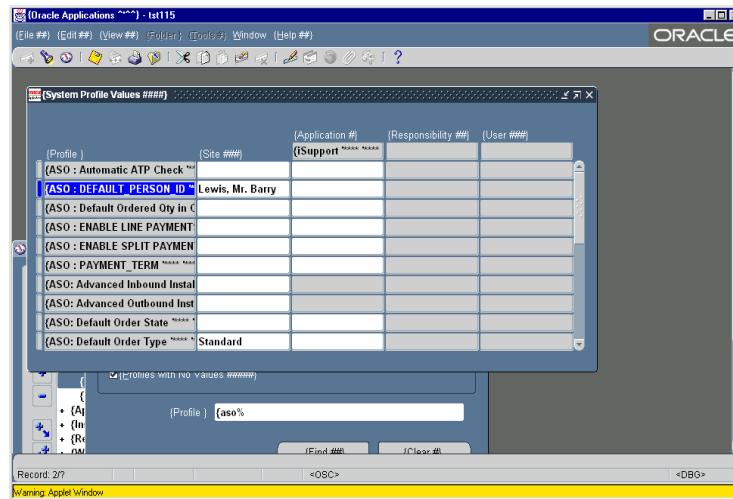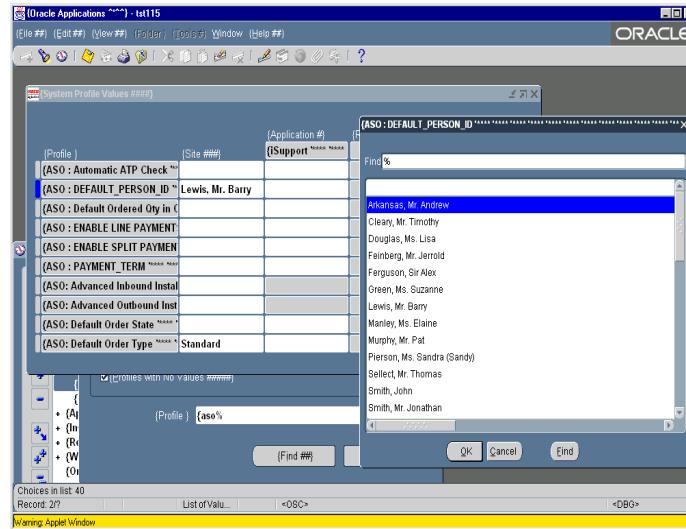
- Find Profile option ASO:DEFAULT Order Type and set it to Mixed at the application level. This allows specification of a mixed Order that can contain Return and Order lines.

- 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.

Access Control Setup

Permissions control access to functions, for example page access/button access, or data which can be made selectively visible. Roles are associated with zero or more permissions. Users can be assigned to zero or more roles. When defining a new permission, no distinction is made between functional or data access permissions.

Usage example:

If the user is associated to the "IBU_Request_View" functional permission, this means the user has access to view the service request page. If the user is associated to the data access permission "IBU_SR_VIEW_SELF", he/she can view all the service requests that belong to them.

iSupport seeded roles

Role Name	Description
IBU_REG_USER	iSupport regular user role
IBU_SYSTEM_ADMIN	iSupport System Admin Role
IBU_EMPLOYEE	Not being used/for future use.
IBU_GUEST_USER	Not being used/for future use.
IBU_MANAGER	Not being used/for future use.
IBU_SELF	Not being used/for future use.

iSupport seeded functional permissions

Permission Name	Description
IBU_Alerts_View	View alerts
IBU_CallMe	Submit a request for an agent to call back
IBU_Call_Me_Edit	Edit call me
IBU_Category_Edit	Edit category
IBU_Company_News_View	View company news

iSupport seeded functional permissions

Permission Name	Description
IBU_Contracts_View	View Customer Contracts
IBU_Defects_View	View Product Defects
IBU_Email	Create structured/unstructured email
IBU_Email_template_Import	Import email template
IBU_Forum	View and post threads
IBU_Forum_Category_Edit	Edit forum category
IBU_Forum_Edit	Edit forum
IBU_Forum_Messages_Edit	Edit forum messages
IBU_Forum_User_Group_Edit	Edit forum user group
IBU_Forum_View_Open	iSupport view open forums
IBU_Forum_View_Restrict	iSupport view open and restrict forums
IBU_Homepage	View and customize homepage
IBU_Invoices_View	View Customer Invoices
IBU_Orders_View	View Customer Orders
IBU_PROPERTY_READ	Permission to read IBU properties
IBU_PROPERTY_UPDATE	Permission to read and update IBU properties
IBU_Patch_View	Download a patch
IBU_Payments_View	View Payments
IBU_Personalized_Homepage_Edit	Edit personalized homepage
IBU_Profile_Update	Update profile/personalization information
IBU_Profile_View	View customer profile/personalization information
IBU_Request_Close	Close a service request
IBU_Request_Create	Create a service request
IBU_Request_Escalate	Change service request urgency
IBU_Request_Management_Edit	Edit request management
IBU_Request_Update	Add a comment to an open service request
IBU_Request_View	View service requests

iSupport seeded functional permissions

Permission Name	Description
IBU_Request_View_Company	iSupport view company service requests
IBU_Request_View_Self	iSupport view self service requests
IBU_Returns_Add	Create Return for a Product
IBU_Returns_View	View Customer Returns
IBU_Role_Mgt	Role Management
IBU_Solution_View_All	Knowledge Management view all solutions
IBU_Solution_View_Public	Knowledge Management view public solutions
IBU_Subscription_Edit	Edit subscriptions
IBU_Survey_Create	Fill in a pre-defined survey
IBU_Survey_Import	Import survey
IBU_Technical_Library_View	View technical documentation
IBU_User_Group_Edit	Edit user group
IBU_User_Mgt	User Management

iSupport seeded Data Access Control (DAC) permissions

Permission Name	Description
ibu_forum_view_open	View all open Categories/Forums
ibu_forum_view_restrict	View all open and restrict /categories forums that the user has access to
ibu_sr_view_self	View all self Service Request
ibu_sr_view_company	View my companyís Service Requests
ibu_solution_view_public	View public Solutions
ibu_solution_view_all	View all solutions

Implementation Recommendation
It is not recommended to modify or alter any of the seeded roles or permissions.

This includes modifying the association between the seeded roles and permissions.

The seeded roles can be used as an example on how to create new roles. Any new roles created can be associated with the existing seeded permissions.

Please note that the "Data" subtab under the "Security" tab in the CRM Foundation System Administration console is not currently being used by iSupport.

Prerequisites

Ensure that Users have been successfully created

Steps

1. Login into CRM System Administration as sysadmin/sysadmin

2. Select the Security tab, Permissions sub tab to view permissions

3. Select the Roles sub tab to view the permissions associated with a particular role (select role)

4. On the Role Mapping screen, associate permissions to roles accordingly.
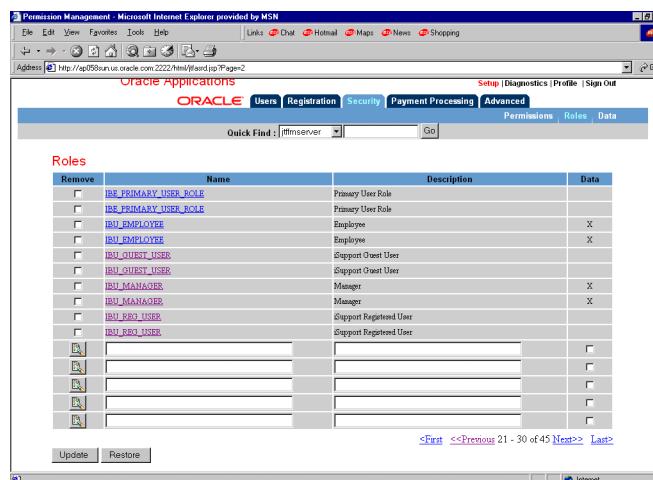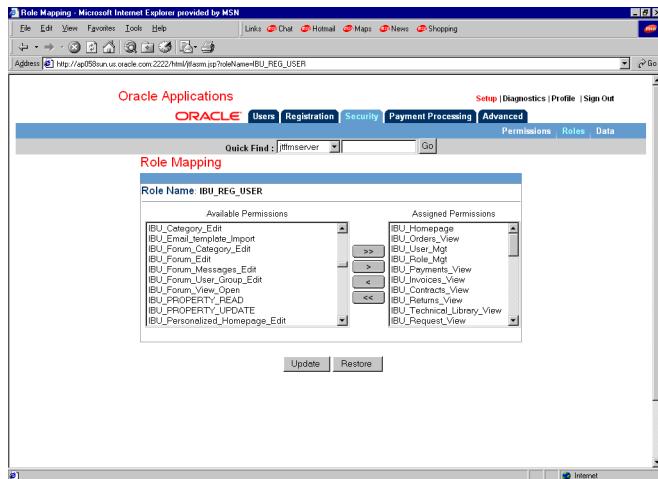
Responsibility Setup

Below is a list of seeded responsibilities provided in iSupport

It is not recommended to modify any of the seeded responsibilitis and their associated menus.

iSupport seeded responsibilities

Responsibility Name	Description
IBU_NORMAL_USER	Normal B2C and B2B user
IBU_PRIMARY_USER	B2B primary user (sys admin)
IBU_SYS_ADMIN	iSupport system admin.
IBU_GUEST	Not being used/for future use.