# Oracle® iSupport

Concepts and Procedures

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## Understanding iSupport Administration

This topic group provides overviews of the Oracle iSupport application and its administration components, as well as iSupport's relationship to other Oracle or third party applications.

## 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:
- Personalized Homepage Management
- Email Setup
- Feedback and Survey Setup
- Subscriptions and Notifications Setup
- Service Request Management
- Forums Setup and Management
- Knowledge Base Search Management

### 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 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

iSupport is integrated with Service Core 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.

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

### 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, and the knowledge base will return solutions related to the statement. The knowledge base can be accessed from both the Support application and the iSupport application. For more information, see Understanding Knowledge Base Search

Use the Knowledge Base Adminstration screens to set up the knowledge base for both iSupport and Support. Knowledge Base Administration allows you to create statement and solution types as well as search, create, and modify solutions.

### 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 groups.

## Integration Points

Oracle iSupport is integrated with:

- MES which provides support information such as white papers and technical documents.
- Oracle Multi-Channel Manager which provides a call back button that allows customer to request a call back at any time when browsing the Web site.
- iCenter Email Management that routes and responds to customer email.
- Oracle Order Capture which provides information on Returned Material Authorizations (RMAs), customer orders, and iStore.
- Oracle Service Core which provides a view of the customer's installed base, escalations, and knowledge management.
- Oracle Contracts which provides the list of customer contracts and status information.
- Oracle Customer Care which provides access to customer relationship plans.

## Administering iSupport

Use the System Administration pages to set up and maintain the iSupport site for your customers. Use the following procedures to set up and administer your site.

## Managing Profiles

The Profile tab provides allows you to mange the following areas:

Personalized Homepage

Configuring Bins and Sections

Subscription Template Setup

## Defining Homepage Sections

You can use Homepage Administration to select and define the personalized homepage sections you want to make available to all users. 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 double right arrow button. The selected section appears in the Available Categories box.
6. To move a section from the Selected Categories to the Available Categories, click the double left arrow button.
7. 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.
8. Click **Update**. The selected sections appear on the customer's homepage.
9. 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.

### Prerequisites

None

### Steps

1. Select the appropriate bin/section.
2. Select Display if you want the section or bin displayed to the customer.
3. Select the Mandatory check box if you do not want the section modified by the customer.
4. Enter the maximum number of rows for each section.
5. Enter the date (DD-MON-YY format) to define the number of days an item is displayed on the user's homepage.
6. Enter the title.
7. Enter the description.
8. Click **Update**. The defined sections are available for all users.

## Setting up Subscription Templates

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

### Prerequisites

None

### Steps

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

## Managing Support

Use the Support tab to manage the following support areas:

- Service Request Management
- Call Me
- Survey

## 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. The request can be directly submitted to support, search the knowledge base for possible solutions, or prompt the customer to make the choice.

## Setting Up the Call Me Option

You can set up call me by selecting the Oracle Telephony host name and the Oracle Telephony port name. Click **Update** to save your changes.

## Setting up Survey

Use Feedback Administration 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

None

### Steps

1. Select Feedback.
2. Enter server, database, user name, and password information.
3. Click **Update.**
4. View the current list of feedback templates, and click Add New Feedback to add a new template.
5. Select a predefined feedback name from the feedback list.
6. From the Associated User Groups table, select the user groups for the feedback template.
7. Click **Create**. Your feedback templates are now mapped to specified user groups.

## Administering Forums

A forum is an interactive area for discussions and commentaries that is dedicated to a certain topic.

## Managing Categories

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

### Prerequisites

None

### Steps

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

## Managing Forums

Forums allow you to post questions and comments and to reply to questions posted by others.

You can create, rename, or delete forums. 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.

## 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.

## Administering Knowledge Base Search

You can use the Knowledge Base Search Administration screens to set up the Knowledge Base for your support organization. For more information on Knowledge Base Search, see What is a Knowledge Base Solution?

## Viewing and Updating Existing Solution Types

A solution type is the name given to a solution set. It defines the support model used within an organization. Two of the most common solution types within the support industry are Symptom, Cause, Action or Problem/Resolution. Use this procedure to search for existing solution types.

### Prerequisites

None

### Steps

1. Click **Setup.** A list of existing solution types displays.
2. To **update** a solution type, click the solution number link. The Solution Type **Update** page appears. At the bottom of the screen is the list of associated statements.
3. Enter your changes and click **Update**.
4. To delete a solution type, follow steps 3 and 4, and click **Delete.**

## Creating New Solution or Statement Types

When setting up iSupport and Support Knowledge Base, you must first create a solution type if one doesn't exist. You can have as many solution types as you want, depending on your customer's needs. Solutions are comprised of one or more elements called statements. You can also create as many statement types needed. Use this procedure to create new statements and solutions.

### Prerequisites

None

### Steps

1. Click **Setup**.
2. Click **Create Type**.
3. Choose either solution or statement from the drop-down list.
4. Enter the name of the solution or statement
5. Enter a description. The description is for DBA use only, and cannot be viewed by the customer.

## Associating Statement Types to a Solution Type

Once you have created a solution type, you must associate statement types to it.

### Prerequisites

Create a solution and statement types.

### Steps

1. Click **Setup**
2. Search for a solution type by solution number or name. The solution type appears.
3. Click **Associate**. The Associate Statement Types screen appears.
4. From the available statement types column, select the statements you want to associate with your solution.
5. In the right column sort your statements list by selecting the up or down arrows.
6. Click **Save**.

## Searching for a Statement

Use this procedure to search for an existing statement in the Knowledge Base.

### Prerequisites

None

### Steps

1. Select Statement.
2. Click **Search**.
3. Enter the statement number, or any known information to help narrow your search.
4. Click **Go**. The list of statements appears.
5. To view a specific statement, click the statement description. The detailed statement appears.

## Creating a Statement

Use this procedure to create a new statement.

### Prerequisites

None

### Steps

1. Select Statement
1. Click **Create.**
2. From the drop-down list, select the type of statement you want to create.
3. In the description field enter a statement description. Based on the statement type, this can be a problem, resolution, solution, cause or action.

## Solutions

Solutions are comprised of statements. There are two ways you can search for an existing solution: Basic Search or Advanced Search. Basic search allows you to search for a solution based on solution type, number, and name and then modify this solution if necessary. Advanced Search has a more comprehensive search. Follow the tasks in the Create a Solution scenario.

## Searching for Solutions Using Basic Search

Use basic search if you want to find a solution using a basic keyword search.

### Prerequisites

None

### Steps

1. Click **Solutions.**
2. From the drop-down list, select the solution type.
3. Enter the solution number, name or description.
4. Click **Go**. Your search solution results are displayed. Search results are organized by score. The higher the score, the more closely the result matches your keyword search.

5. If you are not satisfied with your results, you can click the Refine Search Criteria button to return to the search page.
6. Click the Solution No. link to view solution set details.

## Searching or Creating Solution Sets

Use Advanced search for a more comprehensive search. You can also add statements to a solution set or create a new solution set.

Use this scenario to find a solution to your problem:

1. Enter a Description.
2. Find a Matching Statement
3. Replace a Statement
4. Search for a Related Statement.
5. Search for a Solution
6. Add a Statement.
7. Select Statements to Create a New Solution.
8. Create or Modify a Solution

## Finding Matching Statements

Use this procedure to locate other statements previously created in the knowledge base that may contain the same information as the statement just entered.

### Prerequisites

None

### Steps

1. Click **Solutions.**
2. From the drop-down list, select the solution type for the statements you want to search for in the knowledge base.
3. Enter the solution type for the statement description you are creating.
4. Enter your statement description.
5. Click **Matching Statements**. A list of statements from the knowledge base appear at the bottom of the screen.

6. Select one or more of the statements in the list to either add or replace a statement to the statement area.

## Replacing a Statement

Use the procedure to replace a statement in the statement description area with a statement in the knowledge base.

### Prerequisites

None

### Steps

1. Click **Solutions.**
2. From the drop-down list, select the solution type for the statements you want to search for in the knowledge base.
3. Enter the solution type for the statement description you are creating.
4. Enter your statement description.
5. Click **Matching Statements**. A list of statements from the knowledge base appear at the bottom of the screen.
6. Select a statement you want from the search results area.
7. Click Replace. Your statement description is replaced.

## Searching for a Related Statement or Solution

Use the procedure to search for an existing statement or solution in the knowledge base.

### Prerequisites

None

### Steps

1. Click **Solutions.**
2. From the drop-down list, select the solution type for the statements you want to search for in the knowledge base.
3. Enter the solution type for the statement description you are creating.
4. Enter your statement description.

5. From the Search For drop-down list, select Related Statement or Solution. A list of statements or solutions from the knowledge base appear at the bottom of the screen.

## Adding a Statement

Use this procedure to add a statement to the statement area.

### Prerequisites

None

### Steps

1. Click **Solutions.**
2. From the drop-down list, select the solution type for the statements you want to search for in the knowledge base.
3. Enter the solution type for the statement description you are creating.
4. Enter your statement description.
5. Conduct a Search for a statement you want to add.
6. From the search results area, select the statement or solution you want to add.
7. Click Add. Your statement are displayed in the statement area.

## Creating or Modifying a Solution

Use this procedure to create and edit solutions.

### Prerequisites

None

### Steps

1. In the Statements area, select all the statements you want to include in your solution set.
2. Click Create Solution. The View Solution page appears.
3. Select the solution type.
4. Enter the solution summary.
5. Make sure all the statements are correct, and click Contribute. The main page appears with your new solution.