

Oracle® iSupport

Implementation Guide

Release 11*i*

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Oracle iSupport Implementation Guide, Release 11i

Part No. A86192-04

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

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Preface

This implementation guide describes the implementation and administration of Oracle iSupport, Release 11.5.4.

Topics include:

- Intended Audience
- Other Sources of Information
- Structure
- Documentation Accessibility

Intended Audience

This guide is aimed at the following users:

- Technical Service Representatives (TSR)
- Customer Service Representatives (CSR)
- System Administrators (SA), Database Administrators (DBA), iSupport Administrators (ISA), and other IT professionals who are responsible for implementing and maintaining Oracle iSupport.

This guide assumes you have the following prerequisites:

- Understanding of the company business processes.
- Knowledge of products and services as defined by your marketing policies.
- Basic understanding of Oracle applications and Developer/2000.
- Basic understanding of SQL, PL/SQL, SQL* Plus programming.

Other Sources of Information

Oracle iSupport shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user guides when you set up and use Oracle iSupport. You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with the following URL: <http://docs.oracle.com>. A list of suggested guides follows:

Oracle iSupport

- *Oracle iSupport Release 11i Concepts and Procedures (May 2001)*

CRM Foundation

- *Implementing Oracle CRM: ERP Functional Checklist Release 11i*
- *Implementing Oracle CRM: Foundation Functional Checklist Release 11i*
- *Implementing CRM Applications Release 11i*
- *Installing Oracle Applications Release 11i*
- *Oracle Applications Concepts Release 11i*
- *Oracle Applications System Administrator's Guide*
- *Supplemental CRM Installation Steps Release 11.5.1-11.5.3*

Oracle Service

- *Oracle Service Concepts and Procedures Release 11i*
- *Oracle Service Implementation Guide Release 11i*
- *Oracle Service User's Guide Release 11i*
- *Oracle Installed Base Concepts and Procedures Release 11i*

Oracle TeleService (formerly Support)

- *Oracle Support Concepts and Procedures Release 11i*
- *Oracle Support Implementation Guide Release 11i*

Oracle Contracts Suite

- *Oracle Contracts for Service Concepts and Procedures Release 11i*

- *Oracle Contracts Core Concepts and Procedures Release 11i*

Oracle Order Management

- *Oracle Order Management User's Guide Release 11i*

Oracle Marketing Encyclopedia System (MES)

- *Oracle Marketing Encyclopedia System Implementation Guide Release 11i*
- *Oracle Marketing Encyclopedia System Concepts and Procedures Release 11i*

Oracle Contracts for Service

- *Oracle Contracts for Service Concepts and Procedures Release 11i*

Oracle Accounts Receivable

- *Oracle Accounts Receivable Release 11i*

Oracle Multimedia Channel Manager

- *Oracle Telephony Manager Implementation Guide Release 11.5.1-11.5.3*
- *Oracle Telephony Manager Concepts and Procedures Release 11.5.1-11.5.3*
- *Oracle Telephony Manager Technical Reference Manual*
- *Installing Oracle Call Center Connectors*
- *Oracle Call Center Connectors Implementation Guide Release 11.5.1-11.5.3*
- *Installing Oracle Call Center Connectors Release 11.5.1-11.5.3*
- *Oracle Call Center Applications Setup Release 11.5.1-11.5.3*

Oracle Scripting

- *Oracle Scripting Implementation Guide Release 11.5.1-11.5.3*
- *Oracle Scripting Concepts and Procedures Release 11.5.1-11.5.3*
- *Oracle Scripting Technical Reference Manual*

Oracle Workflow Mailer

- *Oracle Workflow Mailer Implementation Guide Release 11i*

Structure

This guide is organized into the following chapters:

- Chapter 1 provides an overview of the Oracle iSupport application.
- Chapter 2 discusses dependencies and implementation considerations.
- Chapter 3 discusses users and user management, roles and responsibilities.
- Chapter 4 details setting up the Service Request function.
- Chapter 5 details setting up the Transactional Inquiries function.
- Chapter 6 discusses the set up of the Knowledge Management function and MES setups for the Homepage.
- Chapter 7 details setting up the Products function.
- Chapter 8 contains setup details for the Forums function.
- Chapter 9 contains details on how to set up the Homepage.
- Chapter 10 covers system profile options and concurrent manager.

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Oracle *i*Support 11*i* Overview

This chapter provides an overview of the features and architecture of Oracle *i*Support 11*i*. Topics include:

- Product Overview
- Architectural Overview
- Hardware Requirements

1.1 Product Overview

Oracle *i*Support is an Internet-based customer support application enabling merchants to provide self-service customer support online. Oracle *i*Support functionality allows organizations to provide users with multiple sources of product information and problem solutions if optional applications are implemented. Integration with other Oracle products gives users the ability to manage their own service needs.

Oracle *i*Support implementation, including all optional products, can reduce service costs, consolidate service and product information, and allow service personnel to focus on non-repetitive customer requests, thus increasing customer satisfaction and product viability.

Key features and benefits of Oracle *i*Support include the following:

- An optional Service Request system integrated with other Oracle products allows users to submit and manage their customer service requests online. Close integration with Oracle Installed Base and Oracle Contracts Suite allows access to product and contract history if elected by the merchant.
- Optional integration with a powerful Knowledge Management system facilitates access to known problem solutions, while implementation of the

Marketing Encyclopedia System (MES) provides access to white papers, user guides, technical documentation, and valuable Homepage content.

- The Installed Base, when implemented, allows customers to maintain a database of their product purchases, including product details, configurations, and service agreements.
- Optional Transactional Inquiries allow customers to view the history and status of purchases, invoices, payments, and shipments, and to create return material authorizations (RMAs).
- Forums allow customers to search for information, post questions, and share product knowledge with other users.
- The Homepage can contain personalizable information if the merchant chooses to implement optional applications. The merchant is then able to decide what mandatory and optional content to offer.
- The Quick Link functionality permits users to bookmark essential links within the Oracle iSupport application. Frequently-used resources are immediately available.
- Alerts and subscriptions provide notifications to customers of specific events, updates, and promotions. The alerts and subscriptions are displayed in the Company News and Alerts bins on the Homepage and require optional setups.

1.1.1 Service Request Management

Oracle iSupport enables customers to create, modify and view Service Requests online if the TeleService (formerly Support) application is enabled. Once the information has been entered, it is validated by Oracle TeleService and assigned a unique tracking number for future reference. Merchants can enforce product selection and entitlement checking during the Service Request process if they have implemented the relevant application.

A typical business scenario might be:

- Customer logs in to Oracle iSupport.
- Customer accesses Create Service Request and enters contact and Service Request detail information.
- The Service Request allows the customer to query the optional Knowledge Base directly for similar issues prior to creating a new request.
- Customer can use the Quick Link feature to bookmark Knowledge Base response(s).

- Once the Service Request is submitted, the system returns a tracking number to the customer; customers can add Service Requests to their Quick Links pages. Customers have the option of having the Service Request details sent directly to them via e-mail.
- Customers may view, update, and change their Service Requests at any time. They may also attach documents to the Service Request and expedite action.

Note: This functionality is only available if the merchant sets up Service Request.

1.1.2 Knowledge Management and Marketing Encyclopedia System

Knowledge Management and Marketing Encyclopedia System (MES) implementation allow access to the known problems/solutions database, and allows users to locate technical documents, including white papers, user guides, and FAQs. The merchant benefits by increased knowledge among customers and reduced call center activity. The Knowledge Management and MES user interfaces are easy to use and feature flexible search capabilities.

A typical business scenario might be:

- Customer logs in to Oracle iSupport. Customer views Alerts and Company News on the Homepage.
- Customer accesses the optional knowledge base from the Homepage or by using the Support page.
- Customer uses either basic or advanced search functions to locate answers.
- Customer views solution detail, and can add link to the Quick Link page or enter a Service Request if desired.

Note: This functionality is only available if the merchant sets up Knowledge Management and MES.

1.1.3 Transactional Inquiries: Account Management

Oracle iSupport's optional Transactional Inquiries functionality allows users to view detailed transaction history and status. Integration with Oracle Order Management and Oracle Order Capture allows a user to view orders, invoices, payments, and shipping information, as well as to create return material authorizations (RMAs). Integration with Oracle Contracts for Service (if implemented) provides a view of contracts, entitlements validation, and customer service programs and warranties. Customers can also query and sort data by a range of criteria.

A typical business scenario might be:

- Customer logs in to Oracle iSupport.
- Using the Accounts tab, the customer has online, real-time access to complete information regarding account issues, including:
 - Orders and shipments
 - Invoices and payments
 - Contracts
 - Returns
- In addition, Service Requests can also be accessed from the Account tab. (**Note:** In a future release, defects and enhancement management will also be available.)

This functionality allows customers to service their own account needs, requesting information by date or transaction identifiers, e.g. payment amount, invoice number, and customer name.

Note: This functionality is only available if the merchant sets up Transactional Inquiries.

1.1.4 Installed Base: Product Management

The Installed Base is a repository of customer purchase information, including purchase date, product attributes, and applicable service agreements. Installed Base maintains information about purchased products in a tree structure showing all of the parent and child assemblies. It allows users to drill down to view detailed product information. Installed Base tracks, updates, and maintains product configurations whenever a new part or component is installed or replaced. It also allows the grouping of customer products into systems for ease of service. The Installed Base tracks serialized and non-serialized products and provides powerful search capabilities. Product returns are automatically updated in the Installed Base upon RMA receipt. Support organizations benefit from having customers who are informed about their transaction and product histories and applicable contracts.

A typical business scenario might be:

- Customer logs in to Oracle iSupport.
- Customer accesses optional Installed Base from the Products tab.
- Customer may review Product Summary, Add Product or Request a Product Report. Users manage and track products themselves online, decreasing calls to customer service centers and increasing customer control over service issues.

Note: This functionality is only available if the merchant sets up Installed Base.

1.1.5 Online Forums: Information Exchange

Oracle iSupport Forums are online message boards where customers can post questions and comments and review those from other users. Forums enable customers to share information. In Oracle iSupport, users can search for specific subjects or browse within a particular Forum. Oracle iSupport allows merchants to create, manage or delete Forums.

A typical business scenario might be:

- Customer logs in to Oracle iSupport.
- Customer accesses Forums tab to view available Forum categories and subcategories. The structured use of Forums can reduce calls to customer service by providing users another source of product information and problem solutions.
- Advanced Search allows users to query Forums by keywords, category, date, message status, and author. This flexibility makes Forums extremely useful as an evolving knowledge capture tool.

Note: This functionality is only available if the merchant sets up Forums.

1.2 Architectural Overview

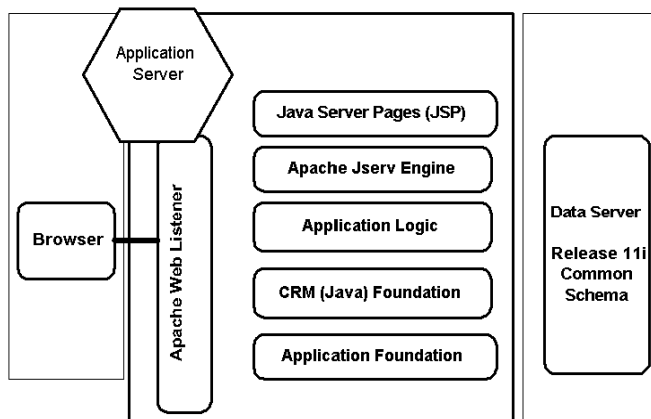
Oracle iSupport architecture is a 3-tier system comprised of:

Data Tier - The data tier includes Oracle ERP and CRM main tables which comprise their common schema. These are driven by the Oracle 8.1.6 database. Most of the CRM application business logic that is written in PL/SQL are also in the data tier.

Application Tier - The application tier uses business logic APIs and CRM Foundation services, Java Server Pages (JSP), and Java APIs. In addition, the Oracle Application Object Library (AOL) supplies technology and common libraries for the applications. In Oracle applications, Apache Server 1.3.9, drives this tier and the Presentation tier discussed below.

Presentation Tier - Generated Java code and compiled servlet code utilize JSP 1.0 and Servlet 2.0 to form the presentation tier. In Oracle applications, the Apache Server 1.3.9 drives this tier.

The diagram below depicts this 3-tier structure.



1.3 Hardware Requirements

The suggested hardware configuration for Oracle iSupport 11i is a series of web servers in the front and a high performance database server machine in the back end. With global systems, the necessity for high performance database servers is even greater.

Oracle recommends the following server requirements:

- ERP database server machine - high throughput at fast speed (CPU)
- Web servers running Apache for external customers
- One forms server for administration

You can determine the actual sizing of the machines after completing capacity planning.

Specific hardware requirements depend on the particular installation that you perform. The hardware requirements listed in the following table are guidelines only, and assume a single-node Vision demo environment.

Table 1–1 Minimum Hardware Requirements

Hardware	Requirement
CPU	2 CPUs minimum, 4 or more highly recommended
Memory	1GB minimum

Table 1–1 Minimum Hardware Requirements

Hardware	Requirement
Disk Space	22GB, including 1GB in /tmp (plus an additional 9GB if installing from a staging area)

Dependency Overview

This chapter describes in general terms the installation setup dependencies for Oracle iSupport 11*i*. Specific, step-by-step setup tasks begin in Chapter 3. Topics include:

- Implementation Considerations
- Types of Dependencies
- Mandatory Modules
- Optional Modules - Recommended
- Optional Modules - Enhancement
- Integration Points with other Oracle Applications
- Suggested Implementation Checklist

2.1 Implementation Considerations

Since Oracle iSupport is comprised of several functional modules, merchants have the flexibility to choose which modules to implement, based on their organizations' desires and specific requirements. Oracle iSupport functional areas are:

- Users and User Management
- Service Requests
- Transactional Inquiries
- Knowledge Management
- Products (Installed Base)
- Forums

- **Homepage**

An overview of the setups and functionalities of these modules is presented in this chapter. The remaining chapters of this guide detail the setup dependencies and steps for each functional area.

2.1.1 Users and User Management Setup

The merchant must create users and assign user responsibilities and roles. This functional setup is mandatory. Chapter 3 of this guide explores Users and User Management in more detail.

2.1.2 Service Request Setup

To allow users access to Service Request functionality, the merchant must implement Service Requests. Chapter 4 of this guide discusses Service Request implementation in more detail.

2.1.3 Transactional Inquiries Setup

To allow users to view details of their transactional histories, including orders, invoices, returns, service requests, payments, entitlements, and contracts, the merchant must implement Transactional Inquiries (Accounts). Chapter 5 of this guide discusses Transactional Inquiries implementation in more detail.

2.1.4 Knowledge Management and MES Setup

The merchant must implement Knowledge Management to allow users to query a knowledge base repository or enforce a knowledge base search prior to Service Request submission. The merchant can offer additional resources to users by implementing the Marketing Encyclopedia System (MES) - a database of technical documents, FAQs, and Company News. MES is required for the Alerts functionality of the Homepage. Chapter 6 of this guide discusses the Knowledge Management and MES implementations in more detail.

2.1.5 Oracle Inventory/Installed Base Setup

The merchant must implement Oracle Inventory for users to view or select from all of an organization's serviceable products. In addition, to allow users to view their product purchases and/or add products to their Installed Base, the merchant must set up Installed Base. Chapter 7 of this guide discusses the product-related implementations in more detail.

2.1.6 Forums Setup

Forums allow the electronic exchange of information among users in an organized, searchable tree structure. To provide this feature, the merchant must implement Forums. Chapter 8 of this guide discusses Forums implementation in more detail.

2.1.7 Homepage Setup

Homepage functionality allows users to personalize their Homepage within Oracle *iSupport*. The Homepage may provide links to such optional items as company news, solution searches, alerts, and service requests. Setting up the Homepage is mandatory, regardless of whether the merchant is using the optional information sources. Chapter 9 of this guide discusses Homepage setup in more detail.

2.1.8 Profile Options and Concurrent Manager

In addition to the functional areas discussed above, other setups are required in the areas of system profile options and concurrent programs. These setups are detailed in Chapter 10 of this guide.

2.2 Types of Dependencies

Oracle *iSupport* integrates with many other Oracle applications to provide data and extend its functionality. Dependencies are classified as:

- **Mandatory** - Must be installed and set up before Oracle *iSupport* will function at the most basic level.
- **Optional Recommended** - Not required for Oracle *iSupport* to function at basic capacity, but recommended for full functionality.
- **Optional Enhancement** - Not required for performance, but offers additional enhancements to Oracle *iSupport*.

2.3 Mandatory Modules

Oracle *iSupport* relies on several Oracle ERP and CRM modules for its data and functionality. The modules that must be installed and set up for Oracle *iSupport* to function properly are discussed in the following paragraphs. For minimum hardware requirements, refer to Chapter 1 of this guide, Product Overview.

Note: This chapter describes Oracle iSupport mandatory and optional dependencies. Step-by-step instructions for setting up each function of Oracle iSupport begin in Chapter 3.

2.3.1 Oracle Application Object Library

The Oracle Applications Object Library (AOL) is a required dependency of all Oracle applications. Supplying technology and common libraries for Oracle applications, AOL allows user creation, responsibility creations and maintenance, and the linkage of users to responsibilities. AOL is contained on the Rapid Install CD.

2.3.2 Oracle CRM Foundation

CRM Foundation 11*i* supplies much of the data and functionality for Oracle iSupport. CRM Foundation consists of: System Administrator Console, Task Manager, Notes, Resource Manager, Calendar, Territory Management, Interaction History, 1-to-1 Fulfillment, Assignment Manager, and Escalation Management.

For information on a typical install of CRM Foundation, refer to the Other Sources of Information: CRM Foundation documentation found in the Preface to this installation guide.

2.3.3 Oracle Service

Oracle Service contains the Knowledge Management and Installed Base applications. For information on a typical install of Oracle Service, refer to the Other Sources of Information: Oracle Service documentation found in the Preface to this installation guide.

2.4 Optional Modules - Recommended

The following are optional but highly recommended modules that allow Oracle iSupport to utilize additional data and improve functionality.

2.4.1 Oracle TeleService

Oracle TeleService (formerly Support) contains the Service Request functionality that allows customers to submit, view, edit, and manage their service requests.

For information on a typical install of Oracle TeleService, refer to the **Other Sources of Information: Oracle Support documentation found in the Preface to this installation guide.**

2.4.2 Oracle Contracts Suite

Oracle iSupport relies on Oracle Contracts Suite to provide information on entitlements, service contracts, warranties and extended warranties, service technician assignment status, and response commitments for Oracle iSupport. The Contracts Suite is comprised of:

Contracts Core - Contracts Core is both an application that provides supporting master agreements, and a foundation for all other Contracts modules. The generic functionality required by all types of contracts is contained in the Contracts Core foundation layer, e.g., contract access control, renewal, termination, and notification management.

Contracts for Service - Contracts for Service creates and manages service contracts, warranties and extended warranties; provides visibility to contract entitlements and proactively acts upon contractual commitments within the contract. Contracts for Service builds upon the foundation of the Contracts Core and adds functionality to meet the specific needs of the service industry, e.g., coverage terms, entitlement checking.

For more details, see **Other Sources of Information: Oracle Contracts Suite documentation found in the Preface to this installation guide.**

2.4.3 Oracle Order Management/Order Capture

Part of the Oracle ERP suite of applications, Oracle Order Management provides Oracle iSupport with order and returns history. Oracle Order Capture is the CRM interface to Order Management. Without these products, customers utilizing Oracle iSupport will not be able to view their orders, shipping details, or returns history. For more information on typical installs of Order Management and Order Capture, see the **Other Sources of Information: Order Management and Order Capture in the Preface to this document.**

2.4.4 Oracle Accounts Receivable

Oracle Accounts Receivables provides invoice and payments data within Oracle iSupport. For more information, see **Other Sources of Information: Oracle Accounts Receivable documentation found in the Preface to this installation guide.**

2.5 Optional Modules - Enhancement

The following modules are not required, but significantly enhance Oracle iSupport performance, data access and functionality.

2.5.1 Oracle MultiMedia Channel Manager

The web call-back feature of Oracle iSupport is dependent upon the Oracle MultiMedia Channel Manager application. For more details, refer to the Other Sources of Information: Oracle MultiMedia Channel Manager documentation found in the Preface to this installation guide.

2.5.2 Oracle Scripting

Oracle Scripting is a ERP application that provides call-center agents with pop-up scripts during support calls. Scripting also allows merchants to get feedback from their customers. Scripting must be installed for the Surveys functions within Oracle iSupport to work.

2.5.3 Human Resources Management System

Oracle Human Resources Management System (HRMS) provides default resource ID data for Service Requests within Oracle iSupport. For more information, see *Implementing Oracle HRMS Release 11i*.

2.6 Integration Points for Functional Areas

Below is a list of the applications that Oracle iSupport calls from when performing various functions.

2.6.1 Users and User Management

- Login (single sign-on) - CRM Foundation (JTF)
- Register a new user - CRM Foundation (JTF)
- Assign user responsibilities and roles - CRM Foundation (JTF)

2.6.2 Service Request

- Create service request - Oracle TeleService
- Update service request - Oracle TeleService

- Close service request - Oracle TeleService
- Escalate service request - Oracle TeleService
- Attach file to service request - CRM Foundation (JTF)
- View service requests - Oracle TeleService
- E-mail confirmation of service request - Workflow Mailer

2.6.3 Transactional Inquiries

- View invoices - Oracle Accounts Receivable
- View payments - Oracle Accounts Receivable
- Create returns - Oracle Order Capture - Order Management
- View returns - Oracle Order Management
- View orders - Oracle Order Management
- View shipments - Oracle Order Management
- Verify customer entitlements - Oracle Contracts for Service
- View contracts - Oracle Contracts for Service

2.6.4 Knowledge Management

- Search knowledge base - Oracle Service/Knowledge Management
- Search solutions in Solution Management System (SMS) - Oracle Service/Knowledge Management
- View solutions in SMS - Oracle Service/Knowledge Management
- Identify product symptom - Oracle Service/Knowledge Management
- Create solution - Oracle Service/Knowledge Management

2.6.5 Products

- View serviceable products - Oracle Inventory
- View product configuration information - Installed Base
- View Installed Base - Installed Base
- Update Installed Base - Installed Base

- View product contact points - Installed Base, Trading Community Architecture

2.6.6 Forums

- All functions - Oracle iSupport

2.6.7 Homepage

- View company news - Marketing Encyclopedia System (MES)
- Publish company news - Marketing Encyclopedia System (MES)
- View Alerts - Marketing Encyclopedia System (MES)
- View collateral documents - Marketing Encyclopedia System (MES)

2.7 Suggested Implementation Checklist

Below is a recommended checklist for implementing Oracle iSupport.

Table 2–1 Implementation Checklist

Step	Required	Description
1	Required	Set up Forms application sysadmin functions, such as Responsibilities, Menus, Profile Options
2	Required	Set up Key Flexfields
3	Required	Set up Languages, Currencies, and Set of Books
4	Required	Set up Organizations
5	Optional	Define Your Employees
6	Optional	Confirm Setup of Oracle Inventory
7	Optional	Confirm Setup of BOM
8	Optional	Confirm Setup of Advanced Pricing
9	Optional	Confirm Setup of Order Management
10	Optional	Confirm Setup of Accounts Receivables
11	Optional	Confirm Setup of Order Capture Profile Options
12	Optional	Confirm Setup of Shipping
13	Optional	Confirm Setup of Workflow for email notifications
14	Required	Confirm Setup of Resources
15	Required	Confirm Setup of Notes
16	Optional	Confirm Setup of Knowledge Management and MES
17	Optional	Confirm Setup of Installed Base
18	Optional	Confirm Setup of Contracts Core

Step	Required	Description
19	Optional	Confirm Setup of Service Contracts
20	Optional	Confirm Setup of Oracle Scripting
21	Optional	Confirm Setup of MultiMedia Channel Manager
22	Optional	Confirm Setup of Oracle TeleService
23	Required	Set up JTF HTML Stack
24	Required	Set up Roles, Permissions
25	Required	Set up iSupport Users - Administrator, Regular User
26	Required	Set up default responsibility for end and business users
27	Required	Assign additional roles and responsibilities to users
28	Optional	Set up Service Request in iSupport
29	Optional	Set up Knowledge Management and MES
30	Optional	Set up Transactional Inquiries
31	Optional	Set up Forums
32	Optional	Set up iSupport Homepage
33	Required	Set up iSupport System Profile Options

Users and User Management

This chapter details how to access the Oracle iSupport application, and discusses user management issues. Topics include:

- Login Interfaces
- Responsibilities, Roles, and Permissions
- Types of Users
- Steps to Create Users

3.1 Login Interfaces

There are two types of login interfaces within Oracle applications - the Oracle Applications Forms login, common to all Oracle applications, and the HTML JTF login screen. The Forms-based applications utilize Oracle Developer 2000, while the HTML applications present the JTF interface to the customer.

3.1.1 Oracle Applications Forms Login

Oracle Applications Forms is a forms-based area where the System Administrator (SA) controls a variety of parameters relating to Oracle iSupport. This is where the merchant assigns responsibilities to the Oracle iSupport Administrator (ISA). For more information on Oracle Applications, refer to *Oracle Applications Concepts, Release 11i*.

3.1.2 JTF (HTML) Console

The JTF console is where all users log in to access Oracle iSupport and other HTML-based applications. The menus that appear after login depend upon the roles and responsibilities assigned to the user logging in. Users will be unable to

access application functionality until they have been assigned both roles and responsibilities.

3.2 Roles, Responsibilities, and Permissions

During the implementation process and throughout the Oracle iSupport application's lifespan, it will be necessary for the merchant (as system administrator) or the iSupport Administrator (ISA) to assign roles, responsibilities, and permissions to users.

This section discusses the terms **roles**, **responsibilities**, and **permissions**. For discussion of **system profile values**, see the Chapter 10, Profile Options and Concurrent Manager.

Note: All roles and responsibilities associated with the Oracle iSupport application contain the prefix IBU.

A **role** is a collection of page- and function-level permissions that are granted to maintain application security. A **permission** is the smallest unit making up a role. There are two types of permissions - Functional and Data Access Control (DAC). Permissions dictate exactly which actions the user can perform.

Responsibilities control the presentation of menus, tabs, and screens. For example, the responsibility IBU_SYS_ADMIN gives that user access to a different set of menus than the responsibility IBU_NORMAL_USER given to Regular Users.

For information on customizing roles and responsibilities, refer to *Oracle CRM Foundation Concepts and Procedures Release 11i* and *Oracle Applications Concepts Release 11i*.

Note: Users will not be able to access application functionality until they are assigned roles and responsibilities.

The tables that follow: Oracle iSupport Seeded Roles, Oracle iSupport Seeded Responsibilities, and Oracle iSupport Roles and Responsibilities by User Type, detail the various seeded roles, responsibilities and how they relate to types of users.

3.2.1 Oracle iSupport Seeded Roles

Role	Description
IBU_REG_USER	Oracle iSupport regular user role: normal user functions
IBU_USER_MANAGEMENT	Oracle iSupport primary user role: normal user functions and in addition can create and approve new users
IBU_SYS_ADMIN	Oracle iSupport System Administrator role: sysadmin for iSupport role
IBU_EMPLOYEE	Future release.
IBU_GUEST_USER	Future release.
IBU_MANAGER	Future release.
IBU_SELF	Future release.

3.2.2 Oracle iSupport Seeded Responsibilities

All seeded responsibilities for all users in Oracle iSupport are IBU_NORMAL_USER.

3.2.3 Roles and Responsibilities by User Type

User Type	Role	Responsibility
Regular User	IBU_REG_USER	IBU_NORMAL_USER
Primary User	IBU_REG_USER	IBU_NORMAL_USER
	IBU_USER_MANAGEMENT	
iSupport SysAdmin (ISA)	IBU_SYS_ADMIN	IBU_NORMAL_USER
	IBU_REG_USER	
	IBU_USER_MANAGEMENT	

3.3 Types of Users

For the purposes of utilizing Oracle applications, users are categorized into various types. User types relate to the application functionality that the users will be accessing. Companies implementing Oracle iSupport will receive a System Administrator (SA) login for the HTML and Forms-based applications. Steps for creating users begin in Section 3.4 below.

There are two required user types that the merchant implementing Oracle iSupport must set up:

- Oracle iSupport Administrator (ISA)
- Oracle iSupport Regular User

In addition to these two mandatory types, the merchant can optionally set up a Primary User and a Knowledge Management User. All of these user types are discussed below.

3.3.1 Oracle iSupport Administrator (ISA)

The merchant implementing Oracle iSupport will use the SA login to set up the Oracle iSupport Administrator (ISA). This is a required user. The Oracle iSupport Administrator (ISA) is a user chosen by the merchant to perform routine but high-level administrative tasks, such as:

- Assigning roles and responsibilities to other users
- Approving business users
- Setting up the Homepage layout and content
- Setting up the Service Request system
- Setting up Product access
- Setting up Knowledge Management and MES
- Setting up Transactional Inquiries functionality
- Setting up Forums and Usergroups

3.3.2 iSupport Regular User

A Regular User covers all general users to Oracle iSupport. These can be either business-to-business (B2B) users, referred to in the registration process as Business Users, or business-to-customer (B2C) users, referred to in the registration process as End users. This user type is required.

- B2B users represent customer organizations. When they register in Oracle iSupport, they must be approved by the merchant or a merchant representative before they have access to the application. The merchant can set default roles and responsibilities for this user.

- B2C users are individual customers. When they register in Oracle iSupport, they are immediately approved and can access the application. The merchant can set default roles and responsibilities for this user.

3.3.3 Knowledge Management (KM) Admin User

This is a user who performs Knowledge Management setup and management, as well as Marketing Encyclopedia System (MES) setup and management. This user is required only if the merchant will use the Knowledge Management functionality. For more information, see Chapter 6 of this guide, Set up Knowledge Management.

3.3.4 iSupport Primary User

User set up to approve other users, in order to assist the ISA in this task. This function can be used as the customer site administrator if needed, limited to approving new users and resetting passwords.

3.4 Steps to Create Users

Below are step-by-step instructions for creating the two mandatory users (the ISA and a Regular User) and the optional Primary User.

3.4.1 Create the iSupport Administrator

The first task in creating the Oracle iSupport Administrator (ISA) is to register the user in Oracle iSupport through the following steps:

1. Select the Register Here link on the JTF login page.
2. Fill in the user's information. **Make a note of the username and password.** For User Type, select Business User, and select the name of the company from the drop-down list. If the company name is not listed, enter the appropriate company information in the required fields. Follow the steps in 3.4.1.2 to Approve User.
3. Select Create. The Acknowledgement Page displays.

3.4.1.1 Associate Roles to ISA

The next step is to associate the appropriate role to the ISA:

1. Log in to the JTF login page as SA.
2. In the list of users, select the user just created. The User Details screen appears.

3. **Select Roles.** In the User-Role Mapping window select, IBU_SYS_ADMIN from the Available Roles list and click Assign (>). Repeat this step to assign IBU_REG_USER and IBU_USER_MANAGEMENT.
4. Select Update.

3.4.1.2 Approve ISA

The next step is to approve the user within Oracle iSupport:

1. Log in to the JTF login page as SA.
2. Navigate to Registration > Approval > Pending Requests.
3. In the Pending Requests screen, select the username.
4. In the Request Details screen, select Accept User. **Note:** A new account is created automatically when you accept the user.
5. Enter any comments in the Accept User Comments box and Submit.
6. Sign out.

3.4.1.3 Associate Responsibility to ISA

The next step is to associate the responsibility of IBU_NORMAL_USER to the ISA. This task is done using Oracle Applications.

1. Log in to Oracle Applications as System Administrator. When the Java applet has loaded select the System Administrator responsibility.
2. In the System Administrator Navigator window, open the Responsibilities form by choosing Security > Responsibilities > Define.
3. Press F11 for query mode and enter the responsibility IBU_NORMAL_USER in the Responsibility Name field.
4. Execute the query by pressing Control F11. The data for the IBU_NORMAL_USER responsibility is displayed.
5. From the menu choose Help > Diagnostics > Examine.
6. Select the List of Values (LOV) for the field. Select the field APPLICATION_ID and click OK. The Value for the APPLICATION_ID should always be 672. (672 is the internal application ID for Oracle iSupport.)
7. Click the LOV for the Field and select the field RESPONSIBILITY_ID.
8. Make a note of the Value for the RESPONSIBILITY_ID, and select Ok.

9. From the menu select Field > Close Form.
10. In the System Administrator Navigator, select Profile > System and open. In the Find System Profile Values screen check the User checkbox and accessing the LOV, select the username you created.
11. Uncheck the Profiles with no Values checkbox and enter JTF%PROFILE% in the Profile field. Select Find.
12. Ensure that the JTF_PROFILE_DEFAULT_APPLICATION for the user is set to 672. If it is not, change it.
13. Set the JTF_PROFILE_DEFAULT_RESPONSIBILITY to the RESPONSIBILITY_ID number identified above.
14. Click the diskette icon at the top of the screen to save and close the form.
15. Open the Users form by selecting Security > Users > Define.
16. Press F11 and enter the username. Press Control F11 to query user.
17. Assign the user IBU_NORMAL_USER responsibility by placing the cursor in the Responsibility field of the first blank record.
18. Click Save; then close all forms and exit the application.

3.4.1.4 Verify ISA Creation

1. At the JTF login page, login as the user just created.
2. Verify that appropriate menus are displayed. **Note:** The default landing page will be the user Homepage if you have assigned IBU_NORMAL_USER responsibility to the ISA. This is where all user tabs are accessible. To view ISA-specific tabs, select the Administration button.
3. Sign out.

3.4.2 Create iSupport Regular User

General users in Oracle iSupport will have the basic role IBU_REG_USER assigned to them.

Note: Users will not be able to access Oracle iSupport until they have the appropriate roles and responsibilities assigned to them.

3.4.2.1 Register Regular User

The first step is to register the user in Oracle iSupport.

1. At the JTF login page, click the Register Here link. This can be done by the user.
2. Enter required information on the User Registration form. Select End User if this user is an individual consumer. Select Business User if the user is a member of a company. **Make a note of the username and password.**
Note: Business Users will require approval by the SA or Primary User before accessing the application. End Users will be approved automatically.
3. Submit.

3.4.2.2 Associate Role to Regular User

The next step is to associate a role to the user. At a minimum, each user must be assigned the IBU_REG_USER role.

1. Log in to the JTF login page as the ISA.
2. Navigate to Administration > User. A list of users appears. Select the appropriate username if it is visible. If it is not visible, search for the user.
To search for a user, use the Find Users drop-down menu to choose User Name, Last Name, or First Name. Enter the appropriate name in the search box. Select Go. Select the username when found.
3. At the User Details screen, select Roles.
4. In the User Role Mapping window select IBU_REG_USER from the Available Roles list, then Assign (>) and Update.
5. Sign out.

3.4.2.3 Approve Regular User

The next step is to accept the user's registration within Oracle iSupport. **Note:** If this is an end user, you will not need to perform this step - end users are automatically approved.

1. Log in to the JTF login page as SA.
2. Navigate to Registration > Pending Requests.
3. In the Pending Requests window, select the username.
4. Select Accept. **Note:** A new account is created automatically when you accept the user. To associate existing accounts with the user, select the Assign Accounts button. Associate appropriate accounts and click Update.
5. Enter any comments in the Accept User Comments box and Submit > Sign Out.

3.4.2.4 Associate Responsibility to Regular User

The next step is to associate basic responsibility to the user.

1. Log in to the JTF login page as the ISA.
2. Navigate to Administration > User. A list of users appears. Select the appropriate username if it is visible. If it is not visible, search for the user.

To search for a user, use the Find Users drop-down menu to choose User Name, Last Name, or First Name. Enter the appropriate name in the search box. Select Go. Select the username when found.

3. In the User Details screen, select Responsibilities.
4. Select the underlined link, Select, to access the List of Values (LOV). Choose IBU_NORMAL_USER. Save and sign out.

3.4.2.5 Verify Regular User Creation

1. At the JTF login page, login as the Regular User.
2. Verify that menus are functioning properly as for a Regular User.

A Regular User will be able to view and access the following tabs: Home, Account, Products, Forum, and Solutions, and the following buttons: iSupport, Email, Profile, and Sign Out. A Regular User will not be able to access administrative functions through the Administration button at the top of the screen.

3. Sign out.

3.4.3 Primary User Role

The SA or the ISA may choose to set up a Primary User who can function as the SA to approve other users and reset passwords. Depending on the size of your company, the number of users waiting approval and/or password resetting may be significant. In this case, setting up another user as a Primary User frees the SA and the ISA to perform other tasks. You can set up as many Primary Users as you wish.

3.4.3.1 Register Primary User

The first step is to register the user in Oracle iSupport. If the user is already registered, you may skip this step.

1. At the JTF login page, click the Register Here link. This can be done by the user.

2. Enter required information on the User Registration form. Select End User if this user is an individual consumer. Select Business User if the user is a member of a company. **Make a note of the username and password.**

Note: Business Users will require approval by the SA or Primary User before accessing the application. End Users will be approved automatically.

3. Submit.

3.4.3.2 Associate Roles to Primary User

The next step is to associate the IBU_USER_MANAGEMENT and IBU_REG_USER roles to the Primary User.

1. Log in to the JTF login page as the ISA.
2. Navigate to Administration > User. A list of users appears. Click on the username if visible. If it is not visible, search for it.
3. To search for a user, use the Find Users drop-down menu to choose User Name, Last Name, or First Name. Enter the appropriate name in the search box. Click Go.
4. In the User Details screen, click Roles.
5. In the User Role Mapping window select IBU_USER_MANAGEMENT from the Available Roles list, then Assign (>) and Update. Repeat steps to assign IBU_REG_USER.
6. Sign out.

3.4.3.3 Approve Primary User

The next step is to accept the user's registration within Oracle iSupport. **Note:** If this is an end user, you will not need to perform this step - end users are automatically approved.

1. Log in to the JTF login page as SA.
2. Navigate to Registration > Pending Requests.
3. In the Pending Requests window, select the username.
4. Select Accept. **Note:** A new account is created automatically when you accept the user.
5. Enter any comments in the Accept User Comments box and Submit > Sign Out.

3.4.3.4 Associate Responsibility to Primary User

The next step is to associate IBU_NORMAL_USER responsibility to the Primary User.

1. Log in to the JTF login page as the ISA.
2. Navigate to Administration > User. A list of users appears. Select the appropriate username if it is visible. If it is not visible, search for the user.

To search for a user, use the Find Users drop-down menu to choose User Name, Last Name, or First Name. Enter the appropriate name in the search box. Select Go. Select the username when found.

3. In the User Details screen, select Responsibilities.
4. Click on Select to access the List of Values (LOV). Choose IBU_NORMAL_USER. Save and sign out.

3.4.3.5 Verify Primary User Creation

1. At the JTF login page, login as the Primary User just created. Or, have the new user login.
2. Verify that menus are functioning properly. A Primary User will be able to view and access the user management screens: accept users on the system administration registration tab and change passwords using the system administration profile button.
3. Sign out.

3.5 User and Registration Process Terms Defined

Below are definitions for common terms associated with users and the registration process.

Business User - A user of a business party that is not a Primary User. This type of user requires approval by the System Administrator or Primary User.

Individual User - A user of a business party that is not a Primary User. This type of user does not require approval.

Merchants - Refers to Oracle e-business suite customers. Used to alleviate confusion with the term *customers*, which refers to customers of a business using Oracle products.

Primary User - A designated person of an external organization (for example, a business partner) or an internal group (for example, sales department) who can be responsible for approving other users and resetting passwords.

Registration - Refers to the process by which any user would gain access to some application functionality.

Registration Admin UI - User Interface (UI) used by merchant administrator or any person granted privileges to maintain users and accounts.

Registration Self-Service User UI - User Interface (UI) that is used by individual users or business users to register themselves.

Responsibilities - A grouping of application menus that determine the user interface accessible to a particular user.

Roles - Groupings of permissions which are page- and function-level, granular privileges used to maintain application security.

Self-Service Registration - Refers to the process of users registering themselves through a self-service UI, as opposed to being registered by an administrator. Self-service registration includes the UI and background processes used to complete the registration processes (including assigning users the appropriate data access and UI access privileges).

User - Refers to any person who needs access to any application. This includes various types of customers, partners, suppliers, and employees.

User Types - Users are categorized into types based on their registration requirements and access privileges. User types are associated with default roles, responsibilities, accounts, registration templates, and approval requirements.

Set up Service Request

This chapter details how to set up the Service Request function of Oracle iSupport. Topics include:

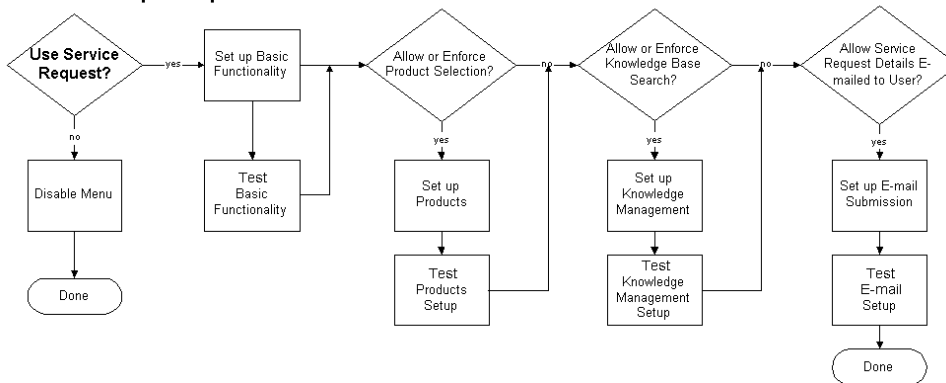
- Use Service Request: Considerations
- Set up Basic Functionality
- Set up Products
- Set up Knowledge Management
- Set up E-mail Submission
- Disable Menu (for those not implementing Service Request)

4.1 Use Service Request: Considerations

Once you decide that you are going to use Service Request, you must set up its basic functionality. In addition, you can choose to implement one or all of these additional functions:

- Allow and/or enforce product selection.
- Allow and/or enforce knowledge base search.
- Allow e-mail submission of Service Request details.

The diagram shown below - Service Request Implementation Decision Flowchart - depicts the decision points and setup flow for the various options.

4.0 Service Request Implementation Decision Flowchart

4.2 Set up Basic Functionality

Even if you do not implement the other three functions of Service Requests, if you wish to provide Service Request submission or viewing to users, you must perform the basic setups that are described below.

4.2.1 Set up Oracle TeleService

Oracle TeleService (formerly Oracle Support) provides Service Request functionality. Service Requests track all issues reported by users - both customers and employees. When creating a Service Request, the following mandatory values are always captured and passed from Oracle iSupport to Oracle TeleService.

4.2.1.1 Request Type

You can define Service Request Types to categorize Service Requests. For each Service Request Type, you can set up the corresponding Service Request Status. For more information, see *Oracle Support Implementation Guide Release 11i*.

4.2.1.2 Status

You can define the Service Request Statuses to indicate the current state of a reported Service Request. You can set a default value for each Type. For example, at Service Request creation, the default status could be Open. For more information, see *Oracle Support Implementation Guide Release 11i*.

4.2.1.3 Severity

Every Service Request must have a Severity associated with it. Seeded severities are Low, Medium or High. The merchant may define additional values. A Service Request Severity reflects the support person's (agent or merchant) perception of the importance of the reported Service Request. For more information, see *Oracle Support Implementation Guide Release 11i*.

4.2.1.4 Contact

This is the customer contact for the Service Request. This provides a support analyst or support manager with the relevant customer contact information. New contacts can be defined in TeleService; in Oracle iSupport, you cannot create a Service Request unless it has contact information associated with it. For more information, see *Oracle Support Implementation Guide Release 11i*.

4.2.1.5 Owner

All Service Requests have an Owner on the agent side. The Owner is the person or group that is assigned to the Service Request and will drive it to resolution.

The TeleService administrator must define resources, either individuals or groups, who will work on the Service Requests that are created. On creation of a Service Request, Oracle iSupport will try to route the Service Request to the appropriate person or group based on the information entered in the Service Request.

For more information, see *Oracle Support Implementation Guide Release 11i*.

4.2.1.6 Customer

A Service Request cannot be created unless it has a customer name associated with it. It is possible to define new customers in Oracle TeleService, but not in Oracle iSupport. Users do not have the ability to define a new Customer party. For more information, see *Oracle Support Implementation Guide Release 11i*.

4.2.1.7 Summary

Every Service Request must have a Summary - a brief description of the problem or issue describing the Service Request. For more information, see *Oracle Support Implementation Guide Release 11i*.

4.2.2 Set up Service Request Defaults

Basic Service Request functionality requires that you set up certain defaults:

1. At the JTF login, log in as the Oracle iSupport Administrator (ISA).
2. Select Support > Request Management > General. In the Request Management Administration screen, set defaults for the following:
 - *Default Severity* - Set a Default Severity for new Service Requests. The Service Request Severity is the priority level assigned to the request when it is created. Seeded values are High, Medium, Low.
 - *Default Status* - Set a Default Status for new Service Requests. The Default Status is the status assigned to the Service Request at creation. Seeded values include Open, Closed, Assignment/Dispatch Complete.
 - *Solved Status* - From the Solved Status list, choose an appropriate default for Service Request closed by customer in Oracle iSupport.
 - *Closed Status* - From the Closed Status list, set a default for closed Service Request.
 - *Default Resource Type* - From the Default Resource Type ID list, set the default resource type. This indicates the resource type associated with the Default Resource ID (see below). Seeded values include Employee Resource, Group Resource, Team Resource.
 - *Default Resource ID* - From the Default Resource ID list, set the default resource for Service Request routing. Refer to Other Sources of Information: Oracle CRM Foundation 11i documentation in the Preface to this guide for more information.
3. Following the text, *When customer submits a request*, choose the appropriate action:
 - *Directly submit to Oracle Support* - This allows Service Request submission without searching the knowledge base. For more information on knowledge base searches, see Chapter 6 of this guide, Set up Knowledge Management.
 - *Always search the Knowledge Base* - This enforces a search of the knowledge base prior to Service Request submission.
 - *Always prompt the customer* - This allows the user to choose whether or not to search the knowledge base prior to Service Request submission.
4. For each request type you may chose to:
 - *Enforce Product Selection* - This enforces the selection of a particular product to associate with the Service Request on the Service Request Details screen.

- *Enforce Entitlement Check* - This enforces a service contract status check for the product or problem associated with the new Service Request.

4.2.3 Testing/Verification

To test that the basic Service Request functionality is working properly:

1. At the JTF login, log in as a Regular User.
2. Access the Create Service Request screen by navigating to Support > Service Request > Create Request or Homepage > How can we help you? > Create Service Request.
3. Submit a new Service Request. If you are able to submit the new Service Request and the system returns a Service Request tracking number, the Service Request basic functionality is working.

4.3 Set up Product Association

Because Service Requests are usually logged against a particular product, it is recommended that you set up Oracle iSupport to allow or enforce users to associate a product with their Service Requests. To use this functionality, follow the instructions in Chapter 7 of this guide, Set up Products.

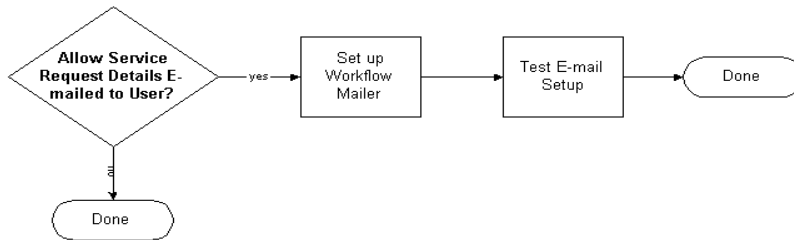
4.4 Set up Knowledge Management

Service Request submissions can be reduced by allowing or enforcing users to search a knowledge base prior to submission. To allow this functionality within the Service Request system, see Chapter 6 of this guide, Set up Knowledge Management and MES.

4.5 Set up E-mail Submission

You can set up Oracle iSupport to allow users to receive, via e-mail, their Service Requests details. The set up steps for this feature are discussed below. In addition, the diagram below depicts the setup process.

E-mail Submission Decision Flowchart



4.5.1 Set up Workflow Mailer

E-mails sent via the Service Request system in Oracle iSupport utilize Oracle Workflow Mailer. To set up Oracle Workflow Mailer, follow the steps outlined in the *Workflow Mailer Implementation Guide Release 11i*.

4.5.2 Testing/Verification

Test that you have set up the e-mail submission feature:

Prerequisite: Ensure that a Profile containing an e-mail address has been set up for a user within Oracle iSupport.

1. Log in to Oracle iSupport as a Regular User.
2. Create and submit a Service Request.
3. On the confirmation screen, select the *Email this to me* button.
4. If you successfully receive the e-mail with the Service Request details, the test was successful.

4.6 Disable Menu Option

If you do not plan to use Service Request, you can disable the Support tab or any of its subtabs. For directions on how to do this, refer to *Implementing CRM Applications Release 11i*, *Installing Oracle Applications Release 11i*, and *Oracle Applications System Administrator's Guide Release 11i*. De-select sub menus under IBU_REQ_MENU as follows:

- (Ask Me subtab) IBU_REQ_ASKME

- (View/Update Requests subtab) IBU_REQ_VIEWSR
- (Create Request subtab) IBU_REQ_CREATESR
- (Call Me subtab) IBU_HLP_CALLME
- (Survey subtab) IBU_HLP_FEEDBACK
- (Patch Search subtab) IBU_REQ_PATCH

Set up Transactional Inquiries

This chapter details how to set up the Transactional Inquiries or Accounts function of Oracle iSupport. Topics include:

- Use Transactional Inquiries: Considerations
- Set up View Orders
- Set up View Shipments
- Set up View Invoices
- Set up View Payments
- Set up View Service Contracts
- Set up View/Create Returns
- Set up View/Create Service Requests
- Disable Menu (for those not implementing Transactional Inquiries)

5.1 Use Transactional Inquiries: Considerations

Since there are seven sub-functions within Transactional Inquiries, which functions you plan to use will determine which additional software you need to setup. Below is a list of Transactional Inquiries functions and their related software dependency.

- *View Orders* - Oracle Order Management
- *View Shipments* - Oracle Order Management
- *View Invoices* - Oracle Receivables

- *View Payments* - Oracle Receivables
- *View Service Contracts* - Oracle Contracts for Service
- *Create/View Returns* - Oracle Order Management, Oracle Order Capture
- *Create/View Service Requests* - Oracle TeleService (formerly Oracle Support)

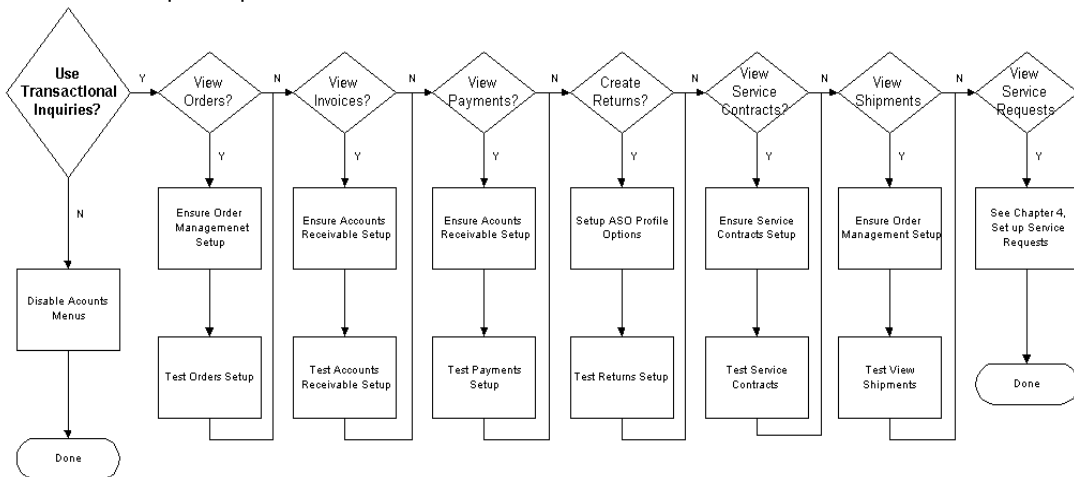
For additional information, refer to the following guides:

- *Oracle Order Management User's and Implementation guides Release 11i*
- *Oracle Order Capture Implementation Guide Release 11i*
- *Oracle Receivables User Guide Release 11i*
- *Oracle Contracts for Service Concepts and Procedures Release 11i*
- *Oracle Support Implementation Guide Release 11i*

The setups of each sub-function of the Transactional Inquiries feature are discussed in the following paragraphs.

The diagram below, Transactional Inquiries Implementation Decision Flowchart, shows the decision-making process and steps for implementing the Transactional Inquiries functionality.

5.0 Transactional Inquiries Implementation Decision Flowchart



5.2 Set up View Orders

With the View Orders feature of Oracle iSupport, users can see the status of their orders created within Oracle Order Management. Ensure that you have set up Oracle Order Management according to the *Oracle Order Management Implementation Guide Release11i*.

5.2.1 Testing/Verification

To verify that you have set up the View Orders feature properly, perform the following test:

1. Log in to Oracle Order Management.
2. Create and view an order for a serviceable product.
3. Log in to Oracle iSupport as the customer for whom you have just created an order.
4. Navigate to Accounts > Orders.
5. Verify that you can view the order.

5.3 Set up View Shipments

With the View Shipments feature of Oracle iSupport, users can see the shipment status of their orders shipped within Oracle Order Management. Ensure that you have set up Oracle Order Management according to the *Oracle Order Management Implementation Guide Release11i*.

5.3.1 Testing/Verification

To verify that you have set up the View Shipments feature properly, perform the following test:

1. Log in to Oracle Order Management.
2. Ship the order that you created in Set up View Orders above.
3. Log in to Oracle iSupport as the customer for whom you have just shipped an order.
4. Navigate to Accounts > Shipments.

5. Verify that you can view the order's shipment details.
6. Verify that you can view the product in the Installed Base (if the item was serviceable) after you run the Installed Base Interface program.

5.4 Set up View Invoices

With the View Invoices feature of Oracle iSupport, users can view a list of the invoices that have been created for their orders. Ensure that you have set up Oracle Receivables according to the *Oracle Receivables User Guide Release11i*.

5.4.1 Testing/Verification

To verify that you have set up the View Invoices feature properly, perform the following test:

1. Log in to Oracle Receivables.
2. Invoice the order created in the Setting up View Orders section above.
3. Log in to Oracle iSupport as the user for whom you have just created an invoice.
4. Navigate to Accounts > Invoices.
5. Verify that you can see the invoice details.

5.5 Setting up View Payments

With the View Payments feature of Oracle iSupport, users can view a list of the payments that have been logged in Oracle Receivables. Ensure that you have set up Oracle Receivables according to the *Oracle Receivables User Guide Release11i*.

5.5.1 Testing/Verification

To verify that you have set up the View Payments feature properly, perform the following test:

1. Log in to Oracle Receivables.

2. Receive a payment against the order created in the Set up View Orders section above.
3. Log in to Oracle iSupport as the user for whom you have just received a payment.
4. Navigate to Accounts > Payments.
5. Verify that you can see the payment details.

5.6 Set up View Service Contracts

With the View Service Contracts feature of Oracle iSupport, users can view a list of their service contracts and applicable details. Ensure that you have set up Oracle Contracts for Service according to the *Oracle Contracts for Service Implementation Guide Release11i*, and that you have set up Oracle Order Management according to the *Oracle Order Management Implementation Guide Release11i*.

5.6.1 Testing/Verification

To verify that you have set up the View Service Contracts feature properly, perform the following test:

1. Log in to Oracle Order Management.
2. Create a service order for the serviceable item created in the Setting up View Orders section above.
3. Run the concurrent program Installed Base Interface.
4. Log into Contracts for Service.
5. Verify that you can view the contract.
6. Log in to Oracle iSupport as the user for whom you created the contract.
7. Navigate to Accounts > Contracts.
8. Verify that you can see the contract details.

5.7 Set up View/Create Returns

With the View/Create Returns feature of Oracle iSupport, users can create returns against orders that have been created in Oracle Order Management, and also view details of returns. Ensure that you have set up Oracle Order Management according to the *Oracle Order Management Implementation Guide Release 11i*.

5.7.1 Testing/Verification

To verify that you have set up the View/Create Returns feature properly, perform the following test:

5.7.1.1 Testing/Verification Part 1

1. Log in to Oracle Order Management.
2. Create a return against the order created in the Setting up View Orders section above.
3. Log in to Oracle iSupport as the user for whom you have just created a return.
4. Navigate to Accounts > Returns.
5. Verify that you can see the return details.

5.7.1.2 Testing/Verification Part 2

1. Log in to Oracle iSupport.
2. Navigate to Accounts > Returns.
3. Create a return against the order created in the Setting up View Orders section above.
4. Log in to Oracle Order Management as the user for whom you have just created a return.
5. Verify that you can see the return details.

5.8 Set up View/Create Service Requests

To set up this module, follow the instructions outlined in Chapter 4 of this guide, Set up Service Request.

5.9 Disable Menu Option

If you do not plan to use any of the Transactional Inquiries elements, you can disable the Accounts tab of Oracle iSupport. For directions on how to do this, refer to *Implementing CRM Applications Release 11i*, *Installing Oracle Applications Release 11i*, and *Oracle Applications System Administrator's Guide Release 11i*. De-select sub menus under IBU_INQ_MENU as follows:

- Orders subtab - IBU_INQ_ORDERS
- Shipments subtab - IBU_INQ_VIEWSHIP
- Invoices subtab - IBU_INQ_INVOICES
- Payments subtab - IBU_INQ_PAYMENTS
- Contracts subtab - IBU_INQ_CONTRACTS
- Returns subtab - IBU_INQ_RMAS
- Service Request subtab - IBU_INQ_VIEWSR

Set up Knowledge Management and MES

This chapter discusses the Knowledge Management and Marketing Encyclopedia System (MES) aspects of Oracle iSupport. Topics include:

- Knowledge Management-Supplied Data
- MES Setups for Homepage

6.1 Knowledge Management-Supplied Data

The Knowledge Management application provides the following for Oracle iSupport:

- Service Request knowledge base search function.
- Homepage bins - Find a Solution and Frequently Used Solutions.

You must set up Knowledge Management to have this functionality within Oracle iSupport. Setup of Knowledge Management is covered in the *Oracle Service Implementation Guide Release 11i: Implementing Knowledge Management*.

6.2 MES Setups for Homepage

MES supplies information for the Alerts, Technical Library and Company News bins on the Homepage, and can be used in the Service Request feature of Oracle iSupport.

6.2.1 Create Regular User

You must set up a user as the Knowledge Management (KM) administrator to continue with the MES setup. Create a Regular User user in Oracle iSupport, as described in Chapter 3, Users and User Management: Oracle iSupport Regular User.

6.2.2 Assign KM Administrator Role

1. Log in to the JTF login as the Oracle iSupport Administrator (ISA).
2. Search for the user to designate as the KM user.
3. Select the user by clicking on the underlined name.
4. In the User Details screen, select Roles.
5. Assign the CS_SYSTEM_ADMIN role to the user.

6.2.3 Assign KM Responsibility and Application ID

1. Log in to the Oracle Forms application as sysadmin/sysadmin.
2. Select Profile > System.
3. Query the user created above.
4. Set the JTF_PROFILE_DEFAULT_APPLICATION value (see below).
5. Set the JTF_PROFILE_DEFAULT_RESPONSIBILITY value (see below).
6. Set the JTF_PROFILE_LANGUAGE to US

Note: To identify the iSupport Application and Responsibility values for your site follow the steps below:

1. Use Oracle Applications; pick Responsibility System Administrator.
2. For Responsibility ID:
 - a. Navigate to Security > Responsibility > Define.
 - b. Query with responsibility key = CS_KB_SYS_ADMIN.
 - c. Go to Help >Diagnostics >Examine >Responsibility ID.
3. For Application ID:
 - a. Navigate to Application > Register.
 - b. Query with Short name = CS.
 - c. Go to Help >Diagnostics >Examine >Application Id

6.2.4 Set up Employee

1. Log in to the Oracle Forms application as sysadmin/sysadmin.
2. Pick responsibility Human Resources, Vision Enterprises.

3. Navigate to People > Create New Employee.
4. Create a new employee.

6.2.4.1 Associate User with Employee and Customer

1. Log in to the Oracle Forms application as sysadmin/sysadmin.
2. Navigate to Security > User.
3. Query the KM_ADMIN_USER.
4. In the Employee/Person box, pick created employee.
5. In the Customer box, pick a customer to associate to employee.

6.2.4.2 Create Resource for Employee/Grant MES Privileges

1. Log in to the Oracle Forms application as sysadmin/sysadmin.
2. Select the responsibility of CRM Resource Manager.
3. Navigate to Import Resources.
4. Query employee using employee number (not ID) and employee name.
5. Select Search.
6. When results display, select Create Resource.
7. In the Role box, pick desired MES Administrator.
8. Save changes by selecting Save.

6.2.5 Set up MES-related Concurrent Programs

To enable MES you must set up four concurrent programs.

1. MES InterMedia Index Sync Operation (every 3 hours or more often)
2. MES InterMedia Index Optimization Operation (every 7 days)
 - [parameter p_optimization_level= fast or full]
3. JTF InterMedia Index Sync Operation (every 3 hours)
4. JTF InterMedia Index Optimization Operation (every 7 days)
 - [parameter p_optimization_level= fast or full]

6.2.6 Publish Content in MES

Create a category in MES for Alerts and publish items to it.

Refer to the *Oracle Marketing Encyclopedia System Concepts and Procedures Release 11i* for information on publishing content.

6.2.7 Integration with iSupport

To integrate MES with iSupport, follow the steps below:

1. Create a Category for Company News and publish items to it (see above).
2. Create a Category for Technical Library and publish items to it (see above).
3. Publish items to the group channel(s) corresponding to the Usergroup(s) defined for iSupport Forums.

6.2.8 Mapping MES categories to Oracle iSupport

1. Log in to iSupport as the ISA.
2. Navigate to >Administration > Technical Library.
3. Associate Technical Library to the appropriate category in MES.

6.2.9 Testing/Verification of MES Setup

To test that you have properly set up MES:

1. Log in to Oracle iSupport as a regular user.
2. On the Homepage, verify that you can see the content you published in MES under the appropriate category.

Set up Products

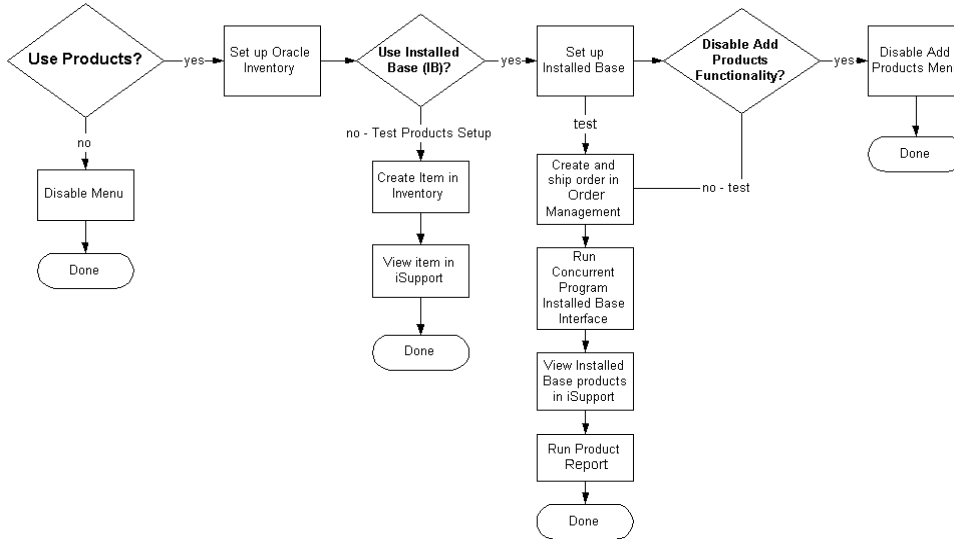
This chapter details how to set up the Products function of Oracle iSupport. Topics include:

- Use Products
- Set up Products
- Set up Installed Base
- Disable menus (for those not implementing Products)

7.1 Use Products

There are two options when setting up Products in Oracle iSupport. You can use all of your company's serviceable products - which requires you to set up part of Oracle Inventory - and you can also set up the Installed Base, which allows you to include all products purchased by customers and their applicable service contracts. The diagram below, Products Implementation Decision Flowchart, shows the decision-making process and implementation steps for the Products functionality.

7.0 Use Products Implementation Decision Flowchart



7.2 Set up Products

To set up basic Products functionality, follow the steps below.

7.2.1 Set up Oracle Inventory

Set up Oracle Inventory according to *Oracle Inventory Implementation Guide Release 11i*. Be sure to set up the following:

- Serviceable items
- Serial Numbers
- Lot Numbers
- Item Revisions
- Units of Measure
- Profile Options

7.2.2 Verification/Testing of Basic Products Setup

To verify that you have set up basic Products functionality:

1. Create a Item in Oracle Inventory.
2. View the created Item in Oracle iSupport.
3. If you cannot view the Item, check your Oracle Inventory Setup.

7.2.3 Set up Installed Base

Prerequisites: Verify that Order Management, Accounts Receivable and other Installed Base dependencies are set up correctly.

To set up Installed Base refer to the *Oracle Service Implementation Guide Release 11i: Implementing Installed Base*. Ensure the setup of the following:

- Product Types
- Product Statuses
- System Types
- Systems
- Configuration Types
- Profile Options
- Run the Concurrent Program, Installed Base Interface

7.2.4 Verification/Testing

To verify that you have set up Installed Base properly:

1. Create and ship an order in Order Management.
2. Run the Concurrent Program Installed Base Interface.
3. Log in to Oracle iSupport as the customer for whom you created and shipped the order in Step 1 and verify that the product is present.
4. Run Product Report and verify that product appears.
5. If product fails to appear, check your Installed Base and Order Management setups and test again.

To verify that the Add Product Function is working:

1. Log in to Oracle iSupport as a Regular User.
2. Navigate to Products > Add Product and add a product.
3. Run the Concurrent Program Installed Base Interface.
4. Navigate to Products. Verify that you can view the product.
5. If you cannot view the product, check the Installed Base setup and run the Installed Base Interface.

7.2.5 Disable Add Products Functionality

You can set up Installed Base without the add products functionality. To do this, disable the Add Product menu by following the directions in *Implementing CRM Applications Release 11i*, *Installing Oracle Applications Release 11i*, and *Oracle Applications System Administrator's Guide Release 11i*. Delete the Oracle iSupport Product submenu IBU_INQ_INSTALLBASE_ADDPRODUCT under IBU_IB_MENU.

7.3 Disable Product Menu Option

If you do not plan to use Products, you can disable the Products tab of Oracle iSupport. For directions on how to do this, refer to *Implementing CRM Applications Release 11i*, *Installing Oracle Applications Release 11i*, and *Oracle Applications System Administrator's Guide Release 11i*. De-select submenus under IBU_IB_MENU as follows:

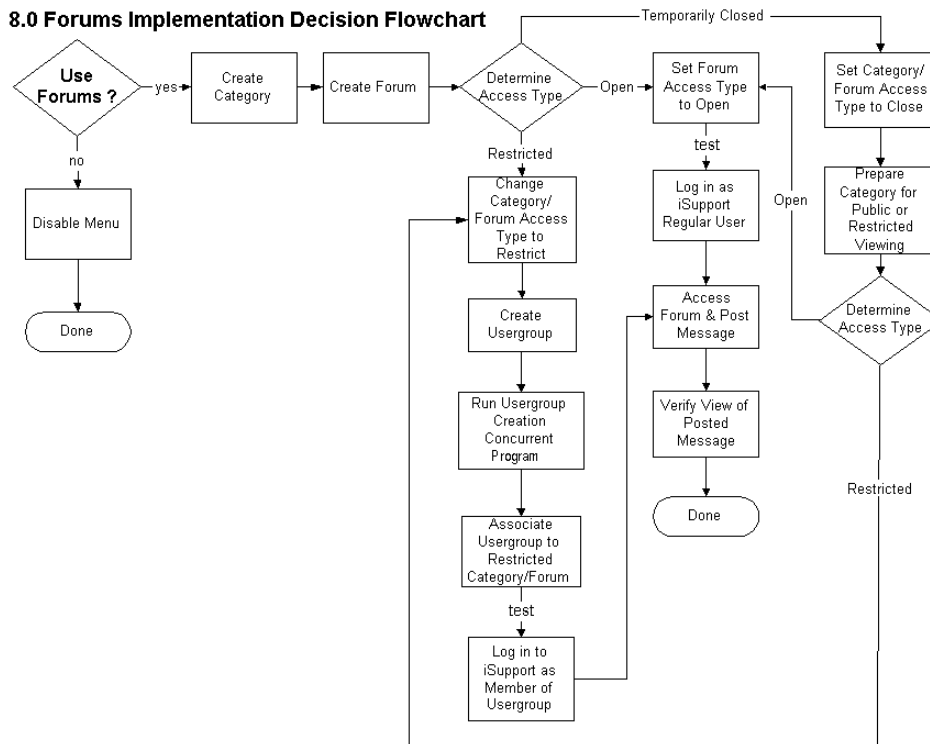
- (Summary subtab) IBU_INQ_INSTALLBASE
- (Add Products subtab) IBU_INQ_INSTALLBASE_ADDPRODUCT
- (Reports subtab) IBU_INQ_INSTALLBASEREPORT

Set up Forums

This chapter details how to set up and maintain the Forums function of Oracle iSupport. Topics include:

- Set up Forums
- Restrict Access to Forums
- Change Forum Access to Open
- Set Forum Access to Disabled
- Additional Information:
 - Forums Search Function
 - Maintaining Categories, Forums, and Messages
- Disable menus (for those not implementing Forums)

You can set up individual Forums as open or with the Restricted Access feature. The diagram below, Forums Implementation Decision Flowchart, shows the decision-making process and implementation steps for the Forums functionality.



8.1 Set up Forums

To set up Forums without restricted access functionality, there are two steps:

1. Create at least one Category.
2. Create at least one Forum.

8.1.1 Create Category

Before users can post to Forums and reply to messages, the ISA must create a Category and a Forum within that category. Categories serve to organize Forums into topic or discussion areas. To create a Category:

1. At the JTF login, log in as the ISA.

2. Navigate to Administration > Forum > Category > Create.
3. To have the new Category exist at the root level, leave the *Choose a parent category* field set to Category Root. To place the new Category underneath another Category, select the parent category from the *Choose a parent category* drop-down list.
4. Enter a name for the Category in the *Enter the name of the new category* field.
5. Leave the Access Type as Open. Restricted categories are not currently supported.
6. Select Create.
7. At the confirmation screen select Ok.

8.1.2 Create Forum

The ISA must create at least one Forum within a Category.

1. At the JTF login, log in as the ISA.
2. Navigate to Administration > Forum > Forum > Create.
3. Select the Category where the Forum will be located.
4. Enter a name for the Forum in the *Enter forum name* field.
5. Leave the Access Type as Open. You can change this later (see Restrict Forum Access, Section 8.2, below)

Note: If Access Type is Open, it is accessible to all users. If you want to restrict access to the Forum at this point, select the Restrict option and follow the detailed steps in Section 8.2 below.

6. Select Create.
7. At the confirmation screen select Ok.

Note: There is no limit to the number of Forums you can create within any given category.

8.1.3 Verification/Testing Access to Open Forum

To verify that you have set up Forums properly, test access to an Open Forum:

1. At the JTF login, log in as an Oracle iSupport Regular User.
2. Navigate to Forum.

3. Access and post a message to an Open Forum.
4. Log out.
5. Log in to the JTF login as the user in step 1 above.
6. Access your message by browsing or searching (see Forums Search Function below).
7. Verify that you can view the message you have just posted.

8.2 Restrict Forum Access Type

In order to restrict access to a Forum, you must set up a Usergroup and then associate that Usergroup with the Forum that you wish to restrict. To view or post messages within a restricted Forum, users must belong to the Usergroup associated with that Forum.

Note: Users who are not members of the Usergroup associated with the restricted Forum cannot view the Forum. Consider informing your users of the existence and nature of restricted Forums so that they can request inclusion in them, if appropriate.

8.2.1 Set Forum Access Type to Restricted

1. At the JTF login, log in as the ISA.
2. Navigate to Administration > Forum > Forum > Modify Status.
3. Select the Forum to modify from the drop-down list.
4. Under Access Type, select the radio button next to Restricted.
5. Select Modify.
6. A confirmation screen appears.

8.2.2 Create Usergroups

To create a Usergroup (Usergroups are the same for iSupport Forums and for MES within iSupport):

1. At the JTF login, log in as the ISA.
2. Navigate to Administration > Support > Usergroup > Create.

3. Click the calendar icon next to Start Date and select a start date for the group. Repeat for End Date.
4. Enter a description for the Usergroup.
5. Enter an SQL statement to define the usergroup.
 - Sample SQL statement number 1: This statement will return customers in the U.S. that have placed orders where the order amount is more than \$10,000.

```
select party_id from hz_parties
where country='US' and total_ordered_amount > 10000
```

- Sample SQL statement number 2: This statement will return all employees for the company.

```
select user_id from fnd_user where employee_id >0
```

Note: Both of the sample statements above would return a very large list. For management purposes, it is better to define usergroups by function, for example, the sales team, or the support team, in which case an extra *where* condition would be entered by the administrator. Please consult your information systems administrator for more information.

6. Select Save.

8.2.3 Run the Usergroup Creation Concurrent Program

In order to populate additional tables and make the Usergroup visible in MES it is necessary to run the Usergroup Creation Concurrent Program (short name is IBUUG). The concurrent program must be run each time you update or add users to a Usergroup. For more information on concurrent programs, see Chapter 10 of this guide, Profile Options and Concurrent Manager.

8.2.4 Associate Usergroup to Restricted Forum

When you choose the Access Type of Restricted for a Forum, you must associate a Usergroup with that Forum.

1. At the JTF login, log in as the ISA.
2. Navigate to Administration > Forum > Usergroup > Associate.
3. Choose a Forum from the drop-down list.
4. Choose a Usergroup to associate with the Forum.

5. Select Associate.
6. A confirmation screen appears.

8.2.5 Verification/Testing of Restricted Forum

To verify that you have properly set up the Restricted Forum Usergroups functionality:

1. At the JTF login, log in as a Regular User who is a member of a Usergroup.
2. Navigate to Forums.
3. Access the restricted Forum associated with your Usergroup.
4. Post a message to the restricted Forum.
5. Log out.
6. Log in to the JTF login as the same user.
7. Navigate to the Forum you posted a message to above (or search for the message you posted; see Forums Search Function below).
8. Verify that you can view the message you have just posted.

8.3 Set Forum Access Type to Open

If you decide to change Forum access from Restricted to Open, follow the steps below:

- Login to Oracle iSupport as ISA.
- Navigate to Administration > Forum > Forum > Modify Status.
- In the drop-down box, select the restricted Forum you want to change.
- Choose Access Type Open
- Select Modify.

8.4 Change Forum Access Type to Disabled

To close access to a Forum while preparing it for public or restricted viewing, follow the steps above in Section 8.3, and select Disabled as Access Type. When you are ready to make the Forum accessible, set Access Type in the Modify screen referenced above. If Access is Restricted, follow the steps to restrict access detailed in the Section 8.2 above.

8.5 Forums Search Function

Follow the guidelines below to use the Forums Search Function.

1. Within Oracle iSupport, navigate to the Forum tab.
2. Select Advanced Search
3. Enter data in any one or all of the following fields:
 - *Subject Keyword(s)* - Enter keywords that may be in the message headers of the appropriate messages.
 - *Message Keyword(s)* - Enter keywords that may be in the bodies of the appropriate messages.
 - *Category* - Leave the drop-down list set to All to search all Categories, or restrict the search to a particular Category by choosing the Category from the list.
 - *Forum* - Leave the drop-down list set to All to search all Forums, or restrict the search to a particular Forum by choosing the Forum from the list.
 - *Date* - Select the calendar icon to the right of the text field, select a date, and then select a radio button: *Before* will find all messages posted before the date chosen, and *After* will find all messages posted after the date chosen.
 - *Author* - Enter the name of the author of the message. Use the format <first name> <space> <last name>
 - *Message Status* - Choose from the radio buttons: *Read* will only search messages that have been viewed by a user. *Unread* will only search messages that have not been viewed by a user. *All* will search both types.
4. Select Search. The application will return a list of messages matching your search criteria.

8.5.1 Search Results

Search results are organized into table format, showing the following data, organized into columns:

- *Score* - Score assigned by the search engine, used to indicate the closeness of the match.
- *Subject Name* - Message header or subject.
- *Author* - Name of the person who posted the message.

- *Date* - Date the message was posted.

To view the message, click on the underlined link under Subject Name. You will then be able to reply to the message or start a new message thread within the message.

8.6 Maintaining Categories, Forums, and Messages

Below are some instructions for performing common Forum maintenance tasks.

8.6.1 Maintaining Categories

Following are directions for common Category maintenance tasks.

8.6.1.1 Delete a Category

To delete a Category:

1. At the JTF login, log in as the ISA.
2. Navigate to Administration > Forum > Category > Delete.
3. Select the Category to delete from the drop-down list.
4. Select Ok.
5. A confirmation message appears.

8.6.1.2 Rename a Category

To rename a Category:

1. At the JTF login, log in as the ISA.
2. Navigate to Administration > Forum > Category > Rename.
3. Select the Category to rename from the drop-down list.
4. Select Modify and enter the new name.
5. A confirmation screen appears.

8.6.2 Maintaining Forums

Following are directions for common Forum maintenance tasks.

8.6.2.1 Delete a Forum

To delete a Forum:

1. At the JTF login, log in as the ISA.
2. Navigate to Administration > Forum > Forum > Delete.
3. Select the Forum to delete from the drop-down list.
4. Select Remove.
5. A confirmation screen appears.

8.6.2.2 Rename a Forum

To rename a Forum:

1. At the JTF login, log in as the ISA.
2. Navigate to Administration > Forum > Forum > Rename.
3. Select the Forum to rename from the drop-down list.
4. Select Modify and enter the new name.
5. A confirmation screen appears.

8.6.2.3 Move a Forum

To move a Forum from one Category to another Category:

1. At the JTF login, log in as the ISA.
2. Navigate to Administration > Forum > Forum > Move.
3. Choose the Forum to move from the drop-down list.
4. Choose the destination Category.
5. Select Move.
6. A confirmation screen appears.

8.6.2.4 Modify Access Status of a Forum

To modify the Access Type of a Forum:

1. At the JTF login, log in as the ISA.
2. Navigate to Administration > Forum > Forum > Modify Status.
3. Select the Forum to modify from the drop-down list.

4. Change the Access Type by selecting the radio button next to the type.
 - Open: All users have access.
 - Restricted: Only members of a Usergroup have access.
 - Disable: No users have access; no one will see the Forum in the list of available Forums.
5. Select Modify.
6. A confirmation screen appears.

8.6.2.5 Modify Attributes of a Forum

The Administrator may add or modify attributes to a Forum in order to increase the organizational and searching capacities of the Forum:

1. At the JTF login, log in as the ISA.
2. Navigate to Administration > Forum > Forum > Modify Attribute.
3. Choose the Forum to modify from the drop-down list.
4. Select Next.
5. Select Add New Attribute. The Add Forum Attributes screen displays.
6. Enter the name of the attribute in the Header Name field.
7. Select Mandatory only if you want to require users to fill in an attribute when posting to the Forum. It is optional to enter the value of the attribute in Header Value. The header value is the default value for this attribute.
8. Select Save.
9. A confirmation screen appears.

8.6.2.6 Disassociate a Usergroup from a Forum

To disassociate a Usergroup from a Forum:

1. At the JTF login, log in as the ISA.
2. Navigate to Administration > Forum > Usergroup > Disassociate.
3. Choose a Forum from the drop-down list.
4. Select Next.
5. In the Disassociate Usergroup screen, select a Usergroup from the drop-down list.

6. Select Next.
7. A confirmation screen appears.

8.6.3 Maintaining Messages

Following are directions for common message maintenance tasks.

8.6.3.1 Delete Messages within a Forum

To delete messages from Forums:

1. At the JTF login, log in as the ISA.
2. Navigate to Administration > Forum > Messages.
3. From the drop-down list, select the Forum that contains message to be deleted.
4. Select Next.
5. The Message Management screen displays a list of all messages, the dates they were posted and the authors' names. Select the underlined link, Delete, next to the message you want to delete.
6. A confirmation screen appears.

8.6.3.2 Move Messages within a Forum

To move messages from one Forum to another:

1. At the JTF login, log in as the ISA.
2. Navigate to Administration > Forum > Messages.
3. From the drop-down list, select the Forum that contains message to be moved.
4. Select Next.
5. The Message Management screen displays with a list of all messages, the dates they were posted and the authors' names. Select the underlined link, Move, next to the message you want to move.
6. From the drop-down list, select the destination Forum for the message and select Ok.
7. A confirmation screen appears.

8.7 Disable Menu Option for those not Using Forums

If you do not plan to use Forums, you can disable the Forums tab of Oracle iSupport. For directions on how to do this, refer to *Implementing CRM Applications Release 11i*, *Installing Oracle Applications Release 11i*, and *Oracle Applications System Administrator's Guide Release 11i*. De-select the menus IBU_CMN_FORUM.

Set up Homepage

This chapter details how to set up the Homepage in Oracle iSupport. Topics include:

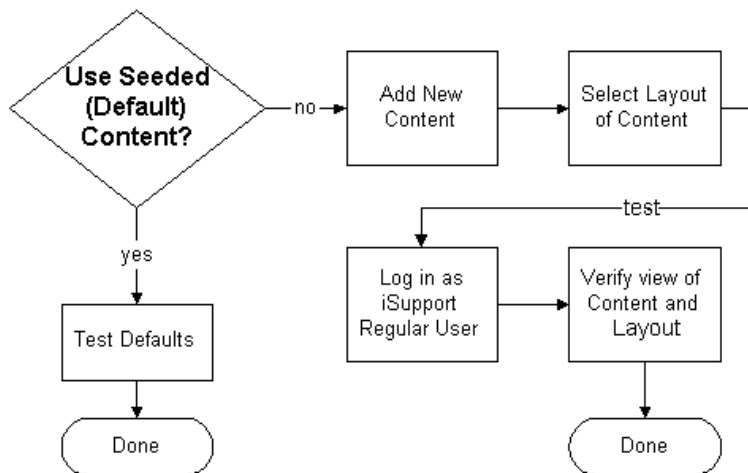
- Homepage: Considerations
- Using Default Content and Layout
- Altering Content and Layout
- Setting up Subscriptions

9.1 Homepage: Considerations

The Homepage is a personalizable work area for the user. The ISA can either accept the default settings shipped with the application (some basic setups are mandatory) or add bins and/or alter/add content that appears within bins. The diagram below - Homepage Implementation Decision Flowchart - depicts the setup steps. The setup steps are also outlined in the following paragraphs.

Important Note: In order to use the Service Request and Knowledge Management features that are accessible from the Homepage, there are additional setup steps; refer to chapters 4 and 6 of this guide for more information.

9.0 Homepage Implementation Decision Flowchart



9.2 Using Default Content and Layout

If you do not wish to add bins or content or change the layout of the Homepage, you can leave the default setup as it is. If you wish to alter the defaults, see Section 9.4 below. The four default bins are:

1. *Service Requests*. This bin contains Service Request information as determined by the merchant (see Updating Service Request Content below).
2. *How Can We Help You?*. This bin contains three hyperlinks to commonly-used functions:
 - *Find a Solution* - This is a link to the Knowledge Management search screen. You must have Knowledge Management set up to access this link. For more information, refer to Chapter 6 of this guide, Set up Knowledge Management and Marketing Encyclopedia System.
 - *Frequently Used Solutions* - This is a link to solutions in Knowledge Management that have been designated as Frequently Used Solutions. You must have Knowledge Management set up to access this link. For more information, refer to Chapter 6 of this guide, Set up Knowledge Management and Marketing Encyclopedia System.

- *Create Service Request* - This is a link to the create Service Request function. You must have Service Request set up to access this link. For more information, refer to Chapter 4 of this guide, Set up Service Request.
- 3. *Alerts*. This bin contains hyperlinks to any Alerts you have set up in the Marketing Encyclopedia System (MES). You must have MES set up to access this link. For more information, refer to Chapter 6 of this guide, Set up Knowledge Management and Marketing Encyclopedia System.
- 4. *Account*. This bin displays user account information.

9.2.1 Testing/Verification of Default Content

To test that you have properly set up the Homepage using the default content and layout:

1. Log in to the JTF login as a Regular User.
2. Verify that you can see the default content on the Homepage.

9.3 Altering Content and Layout

There are two areas of the Homepage that you can alter: the content and the layout.

9.3.1 About Homepage Content

Homepage Content is defined as either Mandatory or Optional, as described below:

- *Mandatory Content* - Information identified as mandatory stays at a fixed location on the Homepage and the user cannot disable it. Any content can be made mandatory by the merchant.

Note: With Mandatory Content, the user has the ability to edit the format of some bins selecting the Edit link on the top of the bin. For example, if you set up Service Requests as a mandatory bin, the user can still choose the fields that are displayed within the bin.

- *Optional Content* - The user can choose not to display the content or can change its layout on the Homepage. The merchant can identify any content as optional.

Information on the Homepage comes from various sources, including Oracle TeleService (formerly called Oracle Support, this is Oracle's full Service Request application), Oracle Contracts for Service, the Knowledge Management system, the Marketing Encyclopedia System (MES), and others as defined by the merchant.

9.3.2 Steps to Add Content

First you must add content to the Homepage and choose its format.

Note: Steps for adding information whose source is the Marketing Encyclopedia System (MES) are in Section 9.3.3 below.

1. Log into the JTF login screen as the Oracle iSupport Administrator (ISA).
2. Navigate to Homepage > Content.
3. On the Content Administration screen, select Add Content. The Add New Content screen displays.
4. In the Content Name field, enter the name of the content category. This will be the title of the bin.
5. In the Format field, use the drop-down menu to select Wide or Narrow. Wide content display is twice as wide as the Narrow content. If you choose Wide, the category will always be displayed in Wide format on the user's Homepage. If you choose Narrow, users will have the option, when setting up their Homepage, to display the category in either format, but only for bins that are not mandatory. Long blocks of text are best set in Wide format.
6. In the View Status field, use the drop-down menu to choose what class(s) of users can view the information. The Customer selection is for users who are not employees of your company. The Employee selection is for users who are employees of your company. If you choose Both, both types of users will see the bin.
7. Using the drop-down menu, choose the PL/SQL package object or Java object path which provides the content information.
 - If the choice is PL/SQL, the merchant must provide a valid PL/SQL package name in the text box next to the drop-down field. Please consult your information systems administrator for more information.
 - If the choice is Java Object, the merchant must provide a Java class name, in the text box next to the drop-down field, which adheres to the standard interface, i.e., provides an API to retrieve. Please consult your information systems administrator for more information.
8. Check Mandatory to require display of the information at a fixed location on the Homepage. You can change this status later if desired by following the steps in the next section, Alter Existing Homepage Content.
9. Check Disable to disable the content. You can change this status later if desired by following the steps in the Section 9.3.4, Steps to Alter Existing Content.

10. Select Save.
11. Optionally, to restore original values click Clear, or select Cancel to return to the previous screen without saving.

9.3.3 Steps to Add MES Content

The Marketing Encyclopedia System (MES) supplies the seeded Alerts bin. It is also the source for Company News, if you choose to set up Company News. Follow the instructions below to add MES content.

Important Note: You must already have set up the MES application. For more information, refer to Chapter 6 of this guide, Set up Knowledge Management and MES.

1. Log into the JTF login screen as the Oracle iSupport Administrator (ISA).
2. Navigate to Homepage > Content > Add MES Content.
3. In the Add MES Content screen, select the content that you wish to add by clicking on the checkbox next to the content name.
4. Select Save. The Content Administration screen appears.
5. Optionally, to restore original values click Clear, or select Cancel to return to the previous screen without saving.

9.3.4 Change Content Layout

To change the layout of the content:

1. Log into the JTF login screen as the Oracle iSupport Administrator (ISA).
2. Navigate to Homepage > Content > Mandatory Layout.
3. To change whether the bins are displayed in a wide column or a narrow column, use the directional buttons (<) (>). Content defined as Narrow format can be moved into Wide column, but not vice versa.
4. To change the order of the bins, use the up and down arrow buttons at the top of the two windows.
5. When finished, select Update. Optionally, to return to original values, select Cancel.

9.3.4.1 Testing/Verification of Content Layout

To test that you have successfully altered the layout of the Homepage:

1. Log in to the JTF login as a Regular User.
2. Verify that you can see the new layout on Homepage.

9.3.5 Steps to Alter Existing Content

To alter information on the Homepage:

1. Log into the JTF login screen as the Oracle iSupport Administrator (ISA).
2. Navigate to Homepage > Content.
3. In the Content Administration window, select the underlined link of the content to alter.
4. The items that you can alter will vary depending upon the content. Most content will have the following alterable fields.
 - *Content Name* - This is bin name, which is currently not editable.
 - *Format* - Use the drop-down menu to select Wide or Narrow. Wide content display is twice as wide as the Narrow content. If you choose Wide, the category will always be displayed in Wide format on the user's Homepage. If you choose Narrow, users will have the choice when setting up their Homepages to display the category in Wide or Narrow format, but only for bins that are not mandatory. It is not recommended set as Narrow information that would best be displayed in a wide format, for example, long blocks of text.
 - *View Status* - This field determines what class(s) of users can view the information. The View Status column displays either Employee, Customer, or Both. If the status is Both, then both the Merchant and the Customer type of user may view the information. Employees of your company will be in the Merchant class, while persons registering from outside the company, i.e., customers, will be in the Customer class of user.
 - *Content Source* - Either a PL/SQL package name or Java object path provides the content information.
 - If the choice is PL/SQL, the merchant must provide a valid PL/SQL package name in the text box next to the drop-down field. Please consult your information systems administrator for more information.
 - If the choice is Java Object, the merchant must provide a Java class name, in the text box next to the drop-down field, which adheres to the standard interface, i.e., provides an API to retrieve. Please consult your information systems administrator for more information.

- *Mandatory* - Requires display of the information at a fixed location on the Homepage. Users cannot change the location or whether or not the content displays on their Homepages. Bins set as Mandatory will always display at the top of the column.
 - *Disable* - Disables the content.
5. Select Update.
 6. Optionally, to restore original values click Restore, or select Cancel to return to the previous screen without saving.

9.3.5.1 Testing/Verification of Non-Default Content

To test that you have properly set up the Homepage using the content that you added in the steps above:

1. Log in to the JTF login as a Regular User.
2. Verify that you can see the new content on Homepage.

9.3.6 Overview of Content Administration Screen

The Content Administration screen displays content variables. Below is a discussion of the content displayed.

9.3.6.1 Column 1: Checkboxes

To delete an item, select the checkbox and click Delete Content. You cannot undo the delete.

9.3.6.2 Column 2: Content Name

Oracle iSupport contains four seeded content categories. These are: Account, How can we help you?, Service Request, and Alerts. Merchants can add categories by clicking Add Content or Add MES Content.

9.3.6.3 Column 3: Disable

The Disable column indicates that the content is unavailable to users.

9.3.6.4 Column 4: Mandatory

Users cannot unsubscribe to mandatory information or alter the layout when setting up their Homepages.

9.3.6.5 Column 5: Content Format

Content format is characterized as Wide or Narrow. Wide content display is twice as wide as the Narrow content.

9.3.6.6 Column 6: From MES

The From MES column indicates whether or not the information is from the Marketing Encyclopedia System. See Set up Knowledge Management and MES for more information.

9.3.6.7 Column 7: View Status

The View Status column displays either Employee, Customer, or Both. This setting indicates what class(s) of users may view the information. For example, if the status is Both, then both the Employee and the Customer type of user may view the information. Employees of your company will be in the Employee class, while persons registering from outside the company, i.e., customers, will be in the Customer class of user.

9.4 Set up Subscriptions

Oracle iSupport allows users to receive content from the Homepage in an e-mail. If the user elects to receive this e-mail, it is necessary for the user to select the Enable Email Subscription in the user profile. The ISA must set up Subscription Templates and Email Interval options to enable this functionality.

9.4.1 Steps to Set up Subscription Templates

To set up subscription templates for e-mail content:

1. Log in to the JTF login as Oracle iSupport Administrator.
2. Navigate to Homepage > Subscription.
3. In the Subscription Template Administration screen, choose a language for the headers and footers of the template.

Note: The language you select as the template header/footer language, will not affect the language of the body of the e-mail. The language of the body is determined by the language chosen in the User Profile screen.

4. In the Subject text field, enter the name of the subscription template.

5. In the Header field, enter the information you want in the header. Seeded values for both header and footer are located in the Clue Word/Description table at the bottom of the screen.
6. In the footer field, enter the information you want in the footer.
7. Select Update to Save the changes, Restore to return to original values, or Reload.

9.4.2 Set up Email Interval

To set up the time interval options between e-mails:

1. Log in to the JTF login as Oracle iSupport Administrator.
2. Navigate to Homepage > Subscription > Email Interval.
3. In the Email Subscription Interval screen, choose the minimum time between e-mails in the Range Start text box.
4. In the Range End box, select the maximum time between e-mails.
5. In the Range Step box, set the step between the start and end time.
6. In the Default Interval textbox, set the default interval to appear in the drop-down list.
7. Select Update to save or Restore to return to previous values.

9.4.3 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 the program is Notification Mailer.

Profile Options and Concurrent Programs

This chapter discusses system profile option settings and concurrent manager setups. Topics include:

- Before you Begin
- Set Foundation (JTF) Properties
- Set JTF Profile Options
- Concurrent Programs

10.1 Before you Begin

Before making Oracle Forms settings, ensure that all Oracle Applications server processes are up and running. In particular, if you stopped concurrent managers before applying Oracle Applications patchsets, restart them now by changing to `$COMMON_TOP/admin/scripts`, and executing `adcmctl.sh<APPS username/APPS password> start`.

10.2 Set Foundation (JTF) Properties

Use the following procedure to set up JTF properties:

1. Go to `http://<host>:<apache port>/html/jtfflogin.jsp`, then log in as `sysadmin/sysadmin`.
2. Navigate to `Advanced > Properties > View JTF` to view JTF properties.
3. Select `Next` to go to the next page. Make sure `guest_partyname` is `IBUGUEST`, `guest_password` is `ibuguest2000`, and `guest_username` is `ibuguest`. To change the password, click on it.

Note: If you change the password here, it will not be reflected in Oracle Forms. To maintain consistency you must also change the IBUGUEST password manually in Forms.

4. Find and select `framework.Logging.system.level`, and set sequence 1 value to debug.
5. Select Update twice.
6. Find `service.Logging.common.level`, and change it to debug.
7. Navigate to Registration > Default Responsibility.
8. Select Business Users from the pull-down menu and set the following:
 - Set Default Application ID to 672.
 - Set Default Responsibility to the value in the `IBU_NORMAL_USER` responsibility field. This is different in every instance (Query the system for the `IBU_NORMAL_USER` responsibility and fill in the value found there).
9. Select End Users from the pull-down menu and set the following:
 - Set Default Application ID to 672.
 - Set Default Responsibility to the value in the `IBU_NORMAL_USER` responsibility field. This is different in every instance (Query the system for the `IBU_NORMAL_USER` responsibility and fill in the value found there).
10. Select Submit. You do not receive feedback on the update, and remain on the same webpage.

10.3 Set JTF Profile Options

A user profile is a set of changeable options that affect the way Oracle applications appear and how they function. Oracle Applications uses a set of user profile options that are common to all the applications; in addition, each module has its own unique set of user profile options. User profile options are set within the Oracle Forms Application.

As System Administrator, you set user profile options at four levels:

- Site - Option settings pertain to all users at an installation site; has the lowest priority.
- Application - Option settings pertain to all users of any responsibility associated with the application; has the next-to-lowest priority.

- Responsibility - Option settings pertain to all users currently signed on under the responsibility; has the second-highest priority.
- User - Option settings pertain to an individual user, identified by application username; has the highest priority.

When a profile option may be set at more than one level, site has the lowest priority, superseded by application, then responsibility, with user having the highest priority. For example, a value entered at the site level may be overridden by values entered at any other level; a value entered at user level has the highest priority and overrides values entered at any other level. The values you set at each level provide run-time values for each user's profile options. An option's run-time value becomes the highest-level setting for that option.

As System Administrator, you should set site-level option values before specifying profile options at the other three levels. The options specified at site-level work as defaults until the same options are specified at the other levels.

Changes to the user profile option values take effect as soon as your users log on again or change responsibilities.

You must set the JTF profile options before the merchant UI will display. The values of the profiles set the basic JTF foundation default elements and values. These profiles are seeded in the Profiles form in ERP, and values are defined by the user (as System Administrator). These profiles are set on the user level for IBU_ADMIN user. The IBU_SYS_ADMIN user is seeded with the product and is the owner of these profile options.

10.3.1 Set JTF Application-Level Profile Options

First you must set application-level profile options:

1. Log on to Oracle Forms by opening `http://<host>:<web port>/`, then selecting `Apps Logon Links > VIS Logon` through the Forms cartridge (UNIX).
2. Log on as `sysadmin/sysadmin`.
3. Select the System Administrator Responsibility.
4. Navigate to `Profile > System > Find System Profile Values`.
5. Check Application and enter `iSupport`.
6. In the Profile field, enter `JTF_PROFILE%`, and select Find.
7. Verify and/or set the following JTF profile options at both site and application level for Oracle iSupport:

- `JTF_PROFILE_DEFAULT_APPLICATION` - This is the default application ID. Set it to 672.
 - `JTF_PROFILE_DEFAULT_BLANK_ROWS` - This sets the number of blank rows on merchant UI forms (can be set to any integer greater than zero). Set it to 3.
 - `JTF_PROFILE_DEFAULT_CSS` - This designates the default cascading style sheet to use for HTML display. Set it to `jtfucss.css`.
 - `JTF_PROFILE_DEFAULT_CURRENCY` - This tells the application which country's monetary currency to use as a default. Set it to USD for U.S. Dollars.
 - `JTF_PROFILE_DEFAULT_NUM_ROWS` - Set this value to 10.
8. On the same screen, verify and/or set the following profile option at application level for Oracle iSupport:
- `JTF_PROFILE_DEFAULT_RESPONSIBILITY` - This is the default responsibility ID. This is different in every instance (Query the system for the `IBU_SYS_ADMIN` responsibility and fill in the value found there).

10.3.2 Set JTF User-Level Profile Options

Next, set user-level profile options for `ibu_guest` and `sys_admin`:

1. Log on to Oracle Forms by opening `http://<host>:<web port>/`, then selecting `Apps Logon Links > VIS Logon` through the Forms cartridge (UNIX).
2. Log on as `sysadmin/sysadmin`.
3. Select the System Administrator Responsibility.
4. Navigate to `Profile > System > Find System Profile Values`.
5. Check Application and User, enter `iSupport` and `IBUGUEST`, respectively.
6. In the Profile field, enter `JTF_PROFILE%`, and select Find.
7. **IBUGUEST PROFILE OPTIONS:** Verify and/or set the following JTF `ibuguest` profile options at the user level for Oracle iSupport:
 - `JTF_PROFILE_DEFAULT_APPLICATION` - This is the default application ID. Set it to 672.
 - `JTF_PROFILE_DEFAULT_CURRENCY` - This tells the application which country's monetary currency to use as a default. Set it to USD for U.S. Dollars.

- JTF_PROFILE_DEFAULT_RESPONSIBILITY - This is the default responsibility ID. This is different in every instance (Query the system for the IBU_NORMAL_USER responsibility and fill in the value found there).
8. **IBU SYS ADMIN PROFILE OPTIONS:** Verify and/or set the following JTF ibu sys admin profile options at the user level for Oracle iSupport:
- JTF_PROFILE_DEFAULT_APPLICATION - This is the default application ID. Set it to 672.
 - JTF_PROFILE_DEFAULT_CURRENCY - This tells the application which country's monetary currency to use as a default. Set it to USD for U.S. Dollars.
 - JTF_PROFILE_DEFAULT_RESPONSIBILITY - This is the default responsibility ID. This is different in every instance (Query the system for the IBU_SYS_ADMIN responsibility and fill in the value found there).

10.3.3 Set Profile Options for Language and Currency

Set the FND_LANGUAGES and FND_CURRENCY profile options in AOL with the appropriate languages and currencies. Defaults for Oracle iSupport come from the list of values populated by the values that you entered in AOL for these profile options.

10.3.4 Set Multi Organization (MO) Profile Options

Use the following procedure to set up multi organization profile options:

1. Log on to Oracle Forms by opening `http://<host>:<web port>/`, then selecting Apps Logon Links > VIS Logon through the Forms cartridge (UNIX).
2. Log on as sysadmin/sysadmin.
3. Select the System Administrator Responsibility.
4. Navigate to Profile > System > Find System Profile Values.
5. Check Site and Responsibility. Enter IBU_NORMAL_USER as the responsibility.
6. In the Profile field, enter MO% and select Find.
7. Verify and/or set the MO: Operating Unit profile option to Vision Operations at the responsibility level. This determines the operating unit being used in Oracle iSupport.

10.3.5 Set Oracle iSupport Profile Options

Use the following procedure to set up Oracle iSupport profile options:

1. Log on to Oracle Forms by opening `http://<host>:<web port>/`, then selecting Apps Logon Links > VIS Logon through the Forms cartridge (UNIX).
2. Log on as sysadmin/sysadmin.
3. Select the System Administrator Responsibility.
4. Navigate to Profile > System.
5. At the Profile screen:
 1. Check Site box.
 2. Check Application box and enter iSupport.
 3. Check User box and enter IBUSER.
 4. Check the Profiles with No Values box and enter %isupport%.
 5. Click Find and set the profile options using the search results.
6. Set the following profile options. To access the List of Values for each Profile, click in the Site or Application field following the Profile description:
 - Choose the iSupport Default Closed Status from the List of Values (LOV). This value determines the status of a service request when it is closed in Oracle iSupport. Set at application and site levels.
 - Choose the iSupport Default Solved Status from the LOV. This value determines the status of a service request when it is solved after a knowledge base search. Set at application and site levels.
 - Choose the iSupport SR Creation Note Type from the LOV if you are implementing Service Request. This value determines the Note Type which is used to default and create a Note when a service request is created from Oracle iSupport. Set at all levels: user, responsibility, application, and site.
 - Choose the iSupport SR Update Note Type from the LOV if you are implementing Service Request. This value determines the Note Type which is used to default and create a Note when a service request is updated from Oracle iSupport. Set at all levels: user, responsibility, application, and site.

10.3.6 Oracle Order Capture Profile Options for Creating Returns

When setting up Oracle Order Capture, the following profile options should be set:

ASO: Default Currency Code - One of the two profile options that determines the currency of the transactions in the application. The currency defined in ASO: Default Order Type takes precedence over this profile option.

ASO: Default Order State - The default state of the order when the quote is booked. Determines whether or not the quote can be booked or entered.

ASO: Default Order Type - Determines how the order is to be processed in Oracle Order Management. The order types are set up in Oracle Order Management. This profile determines what price list and currency code appears by default in the main Order Capture form.

ASO: Default Person ID - The default sales representative who is allocated the sales credits for booked orders when the user is not entered as a sales representative.

ASO: Default Quote Status - Default status of a new quote. When this option is not defined, the default value is Draft.

ASO: Product Organization - The organization that Order Capture uses to validate inventory items.

ASO: Quote Duration - The length of time a quote remains valid.

ASO: Validate Salesrep - If this profile is set to Yes, then the application checks to see if the user is set up as a valid sales representative. If it is set to No, then the application uses the default sales representative entered in ASO: Default Person ID.

10.4 Concurrent Programs

Oracle iSupport requires you to run concurrent programs. The concurrent programs are discussed below. For more information, see the Other Sources of Information: CRM Foundation in the Preface to this guide.

10.4.1 Usergroup Creation

The concurrent program, Usergroup Creation, must be run any time you add to or update a Usergroup. The short name for the program is IBUUG. This program populates additional tables and makes the Usergroup visible in the Marketing Encyclopedia System (MES).

10.4.2 Installed Base Interface

The concurrent program, Installed Base Interface, must be run any time you add to or update products within the Installed Base. This program adds products to the Installed Base.

10.4.3 Notification Mailer

The concurrent program, Notification Mailer, should be run to allow the tracking of user subscriptions in the queue. This is part of the Subscriptions program associated with the Homepage.

10.4.4 MES-related Concurrent Programs

To enable MES you must set up four concurrent programs.

1. MES InterMedia Index Sync Operation (every 3 hours or more often)
2. MES InterMedia Index Optimization Operation (every 7 days)
 - [parameter p_optimization_level= fast or full]
3. JTF InterMedia Index Sync Operation (every 3 hours)
4. JTF InterMedia Index Optimization Operation (every 7 days)
 - [parameter p_optimization_level= fast or full]