

Oracle® iSupport

Concepts and Procedures

Release 11*i*

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Oracle iSupport Concepts & Procedures, Release 11i

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Preface

This concepts and procedures guide describes the administration and use of Oracle iSupport, Release 11.5.5.

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, and other IT professionals who are responsible for implementing and maintaining Oracle iSupport.
- End Users of 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.

Structure

This guide is written and optimized for online help. As online help, it is written in short, self-contained topics that are linked together with hyperlinks. The topics are optimized for online delivery. This means that this guide is best read in PDF or other online format. Printing this document makes it impossible for you to follow the hyperlinks between topics.

Understanding Oracle iSupport provides overviews of the application and its components, explanations or key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

Administering Oracle iSupport provides task-based details for the person responsible for the daily administration of the application.

Using Oracle iSupport provides process-oriented, step-by-step instructions for various tasks that the general user can refer to while working within the application.

Other Sources of Information

The following documents provide additional information on installing, implementing, and using Oracle Customer Relationship Management products.

Oracle iSupport

- *Oracle iSupport Implementation Guide Release 11i*

CRM Foundation (JTF)

- *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*

Documentation Accessibility

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Understanding Oracle *i*Support

This topic group provides an overview of Oracle *i*Support and its components, explanations of key concepts, features, and functions, as well as Oracle *i*Support's relationships to other Oracle or third-party applications.

1.1 Main Components of Oracle *i*Support

The main components of Oracle *i*Support are:

- A Knowledge Management search system which facilitates access to known problem solutions and technical documents.
- A Service Request feature that enables users to submit and manage their customer service requests online.
- Interactive Forums which allow customers to search for information, post questions, and share product knowledge with other users.
- Real-time, online Transactional Inquiries data that gives users 24-hour access to their invoices, payments, shipment information, service contracts, and returns.
- A Homepage that the user can personalize with links to frequently-used functions. In addition, the merchant can provide mandatory and optional content on the Homepage.
- A Quick Links feature which allows users to bookmark information such as Service Requests and knowledge base searches.

1.2 Oracle *i*Support Dependencies and Integration Points

Oracle *i*Support integrates with many other Oracle applications to provide data and extend its functionality. These integration points are discussed below.

1.2.0.1 Oracle Application Object Library

The Oracle Applications Object Library (AOL) supplies technology and common libraries for all Oracle applications. AOL allows user creation, responsibility creations and maintenance, and the linkage of users to responsibilities.

1.2.0.2 Oracle CRM Foundation

CRM Foundation 11i 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 (see *Implementing CRM Applications Release 11i*).

1.2.0.3 Oracle Service

Oracle Service contains the Knowledge Management and Installed Base applications (see *Oracle Service Implementation Guide Release 11i*).

1.2.0.4 Oracle TeleService

Oracle TeleService (formerly Oracle Support) contains the Service Request functionality that allows customers to submit, view, edit, and manage their service requests online (see *Oracle Support Implementation Guide Release 11i*).

1.2.0.5 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 (see *Oracle Contracts for Service Concepts and Procedures Release 11i* and *Oracle Contracts Core Concepts and Procedures Release 11i*).

1.2.0.6 Oracle Order Management

Part of the Oracle ERP suite of applications, Oracle Order Management provides Oracle iSupport with order and returns history (see *Oracle Order Management User's Guide Release 11i*).

1.2.0.7 Order Capture

Order Capture allows merchants to create quotes for customers. These quotes may be booked (ordered), then viewed in Order Management. Orders can be viewed in Oracle iSupport as well. Oracle iSupport uses Order Capture APIs to create returns.

1.2.0.8 Oracle Accounts Receivable

Oracle Accounts Receivables provides invoice and payments data within Oracle iSupport (see *Oracle Accounts Receivable Release 11i*).

1.2.0.9 Oracle MultiMedia Channel Manager

The web call-back feature of Oracle iSupport is dependent upon the Oracle MultiMedia Channel Manager application.

1.2.0.10 Oracle Scripting

Oracle Scripting provides functionality for the Surveys feature of Oracle iSupport.

1.2.0.11 Human Resources Management System

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

1.2.0.12 Oracle iStore

Once orders are placed in Oracle iStore, they can be viewed in Oracle iSupport, using the Accounts tab (see *Oracle iStore Implementation Guide Release 11i*).

Administering Oracle iSupport

This topic group provides task-based procedures that are required for ongoing system maintenance, and includes information on administration tools and utilities. Information in this topic group is designed to be utilized by the Oracle iSupport Administrator or System Administrator.

2.1 Maintaining Users

This topic group provides information on the following tasks:

- [Changing User Contact Information](#)
- [Changing User Password](#)
- [Modifying Company Data for User](#)
- [Changing User Profile Settings](#)
- [Modifying or Assigning Roles](#)
- [Modifying or Assigning Responsibilities](#)
- [Changing Account Assignments](#)

2.1.1 Changing User Contact Information

Change contact information for a user by following the steps below.

1. Login to the JTF login as Oracle iSupport Administrator.
2. Navigate to **Administration > User**. A list of Oracle iSupport users displays.
3. Access the **User Details** screen by either clicking on the name of the user in the list or searching for the user utilizing the **Find User** search function.

4. Make the desired changes to the user's contact information and select **Update User Detail**. A confirmation message appears.

2.1.2 Changing User Password

Follow the steps below to change a user's password.

1. Login to the JTF login as Oracle iSupport Administrator.
2. Navigate to **Administration > User**. A list of Oracle iSupport users displays.
3. Access the **User Details** screen by either clicking on the name of the user in the list or searching for the user utilizing the **Find User** search function.
4. Enter the new password in the **New Password** and **Re-type New Password** fields.
5. Select **Update Password**. A confirmation message appears.

2.1.3 Modifying Company Data for User

Modify company data for a user by following the steps below.

1. Login to the JTF login as Oracle iSupport Administrator.
2. Navigate to **Administration > User**. A list of Oracle iSupport users displays.
3. Access the **User Details** screen by either clicking on the name of the user in the list or searching for the user utilizing the **Find User** search function.
4. In the **Company Detail** area, make the desired changes to the user's business contact information and select **Update Company Detail**. A confirmation message appears.

2.1.4 Changing User Profile Settings

In the **Profiles** screen, you can modify the following:

- **Number of rows** - This sets the number of rows displayed after the user performs any kind of search within Oracle iSupport.
- **Date Format** - Set the default date format according to the following: R = Year; M = month; D = Day.
- **Language** - Choose the default display language for the program. The change will not take effect until the next login by the user.

To modify a customer Profile:

1. At the JTF login, log in as Oracle iSupport Administrator.
2. Navigate to **Administration > User**.
3. Access the **User Details** screen by either clicking on the name of the user in the list or searching for the user utilizing the **Find User** search function.
4. In the **Additional Details** section, select **Profiles**. **Note:** This is NOT the Profile button at the top of the page. The Profiles screen displays.
5. Make the desired changes and select **Finished**. To cancel and not save changes, select Cancel.

2.1.5 Modifying or Assigning Roles

A role is a collection of page- and function-level permissions that are granted to maintain application security. Follow the steps below to modify user roles:

1. At the JTF login, log in as Oracle iSupport Administrator.
2. Navigate to **Administration > User**.
3. Access the **User Details** screen by either clicking on the name of the user in the list or searching for the user utilizing the **Find User** search function.
4. In the **Additional Details** section, select **Roles**. The **Roles** screen displays.
5. In the **Roles** screen, roles that are assigned to the user show a checkmark in the **Assigned** column. Assign or de-assign roles by clicking in the checkbox next to the role name.
6. When finished, select **Save**.
7. Click **Back** when done.

2.1.6 Modifying or Assigning Responsibilities

Responsibilities control the presentation of menus, tabs, and screens. Follow the steps below to modify user responsibilities:

1. At the JTF login, log in as Oracle iSupport Administrator.
2. Navigate to **Administration > User**.
3. Access the **User Details** screen by either clicking on the name of the user in the list or searching for the user utilizing the **Find User** search function.
4. In the **Additional Details** section, select **Responsibilities**. The **Responsibilities** screen displays.

5. In the **Responsibilities** screen, responsibilities that are assigned to the user are numbered sequentially, and the default responsibility will show an active radio button in the **Default** column. To add a responsibility to the user, click the underlined link, **Select**, in the first available, empty **Responsibility ID** column entry. The **Find Responsibilities** screen displays.
6. In the **Find Responsibilities** screen will display a list of available responsibilities. Select the desired Responsibility by clicking in the radio button circle. The **Responsibilities** screen appears with the added **Responsibility** listed. Select **Save**.
7. To set the added responsibility as the default responsibility, select the radio button next it. **Note:** You must Save before setting the default responsibility status to a responsibility just added.
8. To assign additional responsibilities, follow steps 5 and 6 above. Select **Save** during this process to save changes you have made.
9. Select **Finished** when done.

2.1.7 Changing Account Assignments

Follow the steps below to assign a different account number to a user.

1. At the JTF login, log in as Oracle iSupport Administrator.
2. Navigate to **Administration > User**.
3. Access the **User Details** screen by either clicking on the name of the user in the list or searching for the user utilizing the **Find User** search function.
4. In the **Additional Details** section, select **Accounts**. The **Accounts** screen displays.
5. In the **Accounts** screen, accounts that are assigned to the user show a checkmark in the **Assigned** column. Assign or de-assign accounts by clicking in the checkbox next to the account number.
6. When finished, select **Save**.

2.2 Maintaining the Homepage

This topic group provides information on the following tasks:

- [Adding MES Content to Homepage](#)
- [Setting Homepage Content as Mandatory](#)

- [Disabling Homepage Content](#)
- [Understanding the Content Administration Screen](#)
- [Enabling Subscriptions E-mail Feature](#)

2.2.1 Adding MES Content to Homepage

The Marketing Encyclopedia System (MES) supplies the seeded Alerts and Company News bins, plus any other content you choose to publish and make available. Follow the instructions below to add MES content.

Prerequisite: Set up the MES application, publish content to it, and run the necessary concurrent programs (see *Marketing Encyclopedia System Implementation Guide Release 11i*).

1. Log in to the JTF login screen as the Oracle iSupport Administrator.
2. Navigate to **Administration > 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.

2.2.2 Setting Homepage Content as Mandatory

You can set information on the Homepage as mandatory, meaning it cannot be disabled by users. Mandatory content always displays at the top of its column. Additionally, you can choose to display mandatory content as wide-format or narrow-format. Follow the steps below to change content to mandatory and choose its layout.

1. Log into the JTF login screen as the Oracle iSupport Administrator.
2. Navigate to **Administration > Homepage > Content**. The **Content Administration** screen appears.
3. Select the appropriate content by clicking on the underlined linkname. The **Update Content** screen appears.
4. In the **Update Content** screen, place a checkmark in the **Mandatory** checkbox.
5. In the **Content Format** field, set the content as either wide-format or narrow-format. Wide content display is twice as wide as the Narrow content. Keep in mind that you do not want to display wide-format content in a narrow column.

6. Select **Update**.

2.2.2.1 Changing Bin Order

If you have more than one mandatory content item and wish to change the order of the bins, follow the steps below:

1. Log into the JTF login screen as the Oracle iSupport Administrator.
2. Navigate to **Administration > Homepage > Content > Mandatory Layout**.
3. Select content and click the up or down arrow buttons to set the order.
4. When finished, select **Update**.

2.2.3 Disabling Homepage Content

Follow the steps below to disable Homepage content and make it inaccessible to the general user.

1. Log in to the JTF login screen as the Oracle iSupport Administrator.
2. Navigate to **Administration > Homepage > Content**. The **Content Administration** screen appears.
3. In the **Content Administration** screen, select content by clicking on the underlined linkname. The **Update Content** screen displays.
4. In the **Update Content** screen, place a checkmark in the **Disable** checkbox.
5. Select **Update**.

2.2.4 Understanding the Content Administration Screen

The Content Administration Screen is the first screen that displays when you select the Homepage tab. The content of the screen is discussed below.

2.2.4.1 Column 1: Checkboxes

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

2.2.4.2 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.

2.2.4.3 Column 3: Disable

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

2.2.4.4 Column 4: Mandatory

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

2.2.4.5 Column 5: Content Format

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

2.2.4.6 Column 6: From MES

The From MES column indicates whether or not the information is from the Marketing Encyclopedia System. See [Adding MES Content](#) for more information.

2.2.4.7 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.

2.2.5 Enabling Subscriptions E-Mail Feature

The Subscriptions feature of Oracle iSupport allows user to receive Homepage content in e-mail form. This topic contains the following subtopics:

- [Setting up Subscription Templates](#)
- [Establishing E-Mail Intervals](#)
- [Running the Subscriptions Concurrent Program](#)

Prerequisites: User must select Enable Email Subscription in his profile options and you must have Oracle Workflow Mailer set up.

2.2.5.1 Setting up Subscription Templates

1. Log in to the JTF login as Oracle iSupport Administrator.
2. Navigate to **Administration > 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**.

2.2.5.2 Establishing E-mail Intervals

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

1. Log in to the JTF login as Oracle iSupport Administrator.
2. Navigate to **Administration > 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.

2.2.5.3 Running the 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**. See *Oracle Applications Concepts Release 11i* for more information.

2.3 Maintaining Service Request Functions

This topic group provides information on the following tasks:

- [Setting Service Request Defaults](#)

2.3.1 Setting Service Request Defaults

Follow the steps below to change the way Oracle iSupport handles new service requests.

Important Note: Any time you apply a new application patchset, you may need to reset these defaults.

1. At the JTF login, log in as the Oracle iSupport Administrator.
2. Navigate to **Administration > 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, and 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, Engineer On-Site, Resolution in Progress, Clear, and Cancelled by User.
 - **Closed Status** - From the Closed Status list, set a default for closed Service Request. Seeded values include Open, Closed, Assignment/Dispatch Complete, Engineer On-Site, Resolution in Progress, Clear, and Cancelled by User.
 - **Default Create Notetype** - Set a default for the notetype used when a Service Request is created. Seeded defaults are Action, Activity, Cause, Changes, Closure, Contract Articles, Deduction Notes, Fact, Interaction, Objective, Problem Description, Resolution Description, and Symptom.
 - **Default Update Notetype** - Set a default for the notetype used when a Service Request is updated. Seeded defaults are Action, Activity, Cause, Changes, Closure, Contract Articles, Deduction Notes, Fact, Interaction, Objective, Problem Description, Resolution Description, and Symptom.
 - **Default Escalate Notetype** - Set a default for the notetype used when a Service Request is escalated. Seeded defaults are Action, Activity, Cause, Changes, Closure, Contract Articles, Deduction Notes, Fact, Interaction, Objective, Problem Description, Resolution Description, and Symptom.

- **Default Closed Notetype** - Set a default for the notetype used when a Service Request is closed. Seeded defaults are Action, Activity, Cause, Changes, Closure, Contract Articles, Deduction Notes, Fact, Interaction, Objective, Problem Description, Resolution Description, and Symptom.
 - **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 person who will be the default resource for Service Request routing.
3. In the **During Service Request Creation** area, set the following defaults:
- **Search Knowledge Base:**
 - Always Prompt Customer** gives users the option of searching or not searching the knowledge base.
 - Always Search Knowledge Base** enforces knowledge base search prior to submission of the service request.
 - Directly Submit to Oracle iSupport** bypasses the knowledge base search option.
 - **Enforce Product Selection:**
 - Yes** enforces product selection prior to submission of the Service Request.
 - **-No** bypasses the product selection enforcement option.
4. When finished, select **Update**.

2.4 Managing Forums

This topic group provides information on the following tasks:

- [Creating Categories](#)
- [Creating Forums](#)
- [Maintaining Categories](#)
- [Maintaining Forums](#)
- [Maintaining Messages](#)

Note: Restricted Categories, Usergroups, and restricted Forums will be supported in a future release.

2.4.1 Creating Categories

Follow the steps below to create a Category.

1. At the JTF login, log in as the Oracle iSupport Administrator.
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**.

2.4.2 Creating Forums

Follow the steps below to create a Forum.

1. At the JTF login, log in as the Oracle iSupport Administrator.
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. Select the **Access Type** of **Open**. Restricted Forums are not currently supported.
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.

2.4.3 Maintaining Categories

This topic group contains information on the following tasks:

- [Deleting Categories](#)
- [Renaming Categories](#)

2.4.3.1 Deleting Categories

To delete a Category:

1. At the JTF login, log in as the Oracle iSupport Administrator.
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.

2.4.3.2 Renaming Categories

To rename a Category:

1. At the JTF login, log in as the Oracle iSupport Administrator.
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.

2.4.4 Maintaining Forums

Following are directions for common Forum maintenance tasks.

- [Deleting Forums](#)
- [Renaming Forums](#)
- [Moving Forums](#)
- [Modifying Forum Attributes](#)

2.4.4.1 Deleting Forums

To delete a Forum:

1. At the JTF login, log in as the Oracle iSupport Administrator.
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.

2.4.4.2 Renaming Forums

To rename a Forum:

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

2.4.4.3 Moving Forums

To move a Forum from one Category to another Category:

1. At the JTF login, log in as the Oracle iSupport Administrator.
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.

2.4.4.4 Modifying Forum Attributes

The Administrator may add, modify or delete attributes to a Forum in order to increase the organizational and searching capacities of the Forum. Select a topic below for more details:

- [Add New Attribute](#)
- [Modify Existing Attribute](#)
- [Delete Attribute](#)

2.4.4.4.1 Add New Attribute

Follow these steps to add an attribute:

1. At the JTF login, log in as the Oracle iSupport Administrator.
2. Navigate to **Administration > Forum > Forum > Modify Attributes**.
3. Choose the **Forum** whose Attribute you wish to modify from the drop-down list.
4. Select **Next**. The **Modify Forum Attribute** screen displays.
5. Select **Add New Attribute**. The **Add Forum Attributes** screen displays.
6. Enter the name of the new 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.

2.4.4.4.2 Modify Existing Attribute

Follow these steps to modify an existing Attribute:

1. At the JTF login, log in as the Oracle iSupport Administrator.
2. Navigate to **Administration > Forum > Forum > Modify Attributes**.
3. Choose the **Forum** whose Attribute you wish to modify from the drop-down list.
4. Select **Next**. The **Modify Forum Attribute** screen displays.
5. Select the **Edit** underlined link next to the appropriate Attribute.
6. Enter the new 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.

2.4.4.4.3 Delete Attribute

Follow these steps to delete an Attribute:

1. At the JTF login, log in as the Oracle iSupport Administrator.
2. Navigate to **Administration > Forum > Forum > Modify Attributes**.
3. Choose the **Forum** whose attribute you wish to delete from the drop-down list.
4. Select **Next**. The **Modify Forum Attribute** screen displays.
5. Select the **Delete** underlined link next to the appropriate Attribute.
6. A confirmation screen appears.

2.4.5 Maintaining Messages

This topic group includes information on the following tasks:

- [Deleting Messages](#)
- [Moving Messages](#)

2.4.5.1 Deleting Messages

To delete messages from Forums:

1. At the JTF login, log in as the Oracle iSupport Administrator.
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.

2.4.5.2 Moving Messages

To move messages from one Forum to another:

1. At the JTF login, log in as the Oracle iSupport Administrator.
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.

2.5 Maintaining Solutions

Functionality for this feature of Oracle *iSupport* is retrieved from the Knowledge Management application. For information on maintaining the Solutions Management System which is required for knowledge base searches, refer to the Knowledge Management documentation and online help.

Using Oracle *i*Support

This chapter provides process-oriented, task-based procedures for using Oracle *i*Support to perform essential business functions. This chapter covers navigation and screen functionality, and explains how to use the fields and other elements within the screens.

3.1 Choosing Homepage Content

Content on your Homepage consists of information that the merchant supplies, such as Company News or Alerts, and information that you choose to display, such as Quick Links or Service Request links. Some content on the Homepage is mandatory (cannot be de-selected) and some is optional. The merchant decides what content displays mandatorily. Follow the steps below to choose the content for your Homepage.

1. Within Oracle *i*Support, navigate to **Home > Content**. A list of content choices displays.
2. Choose topics from the **Optional Content** list by clicking in the checkbox next to the content topic. Wide (W) content can only be displayed in a wide column; narrow (N) content can be displayed in either size column.
3. Click **Update** to save changes.

3.2 Changing Homepage Display

Follow the steps below to change how content displays on your Homepage.

1. Within Oracle *i*Support, navigate to **Home > Layout or Homepage > Content > Change Layout**.

2. To switch from the current column layout, click **Switch to x Column Layout**, where *x* represents the number of columns.
3. To move information from one column to another, click on the topic and use the arrow buttons move it right, left, up, or down.
4. Click **Update** to save changes.

Note: Some bins on your Homepage are editable, meaning you can choose what data displays in them. These bins will have an **Edit** button at the top of the bin; select this button to change the display properties of the bin.

3.3 Creating Service Requests

Follow the steps below to create a Service Request.

1. Within Oracle iSupport, navigate to **Support > Create Request** or click **Create Service Request** link in the **How Can We Help You?** section on your Homepage.
2. Optionally, in the **Create Service Requests** screen, choose a profile to associate with the Service Request. (See [Setting up a Service Request Profile](#)).
3. In the **Contact Information** area:
 - a. Choose the **Account Number** to associate with the Service Request.
 - b. Select **Primary Contact** for the Service Request.
 - c. Optionally, enter a **Project Number** to associate with the Service Request.
 - d. Select the preferred **Method of Contact** (e-mail, phone or fax).
4. In the **Service Request Details** area:
 - a. Choose a **Request Type** for the Service Request.
 - b. **Enter product information** if the Service Request relates to a product. Select the **Go** button. In the List of Values (LOV) that displays (see the note below), click the radio button next to the appropriate.

Note: The LOV that displays without a checkmark in the **Select from products I own** checkbox is the entire list of serviceable items in inventory. The LOV that displays with the **Select from products I own** checkbox activated is the Installed Base for the Primary Contact selected above (or for the Service Request Profile associated with the Service Request - see [Setting up a Service Request Profile](#)).

The Installed Base is a repository of purchase information, including products purchased, purchase dates, configuration types, service agreements, and other data. See [Adding Products to the Installed Base](#) for more information.

Search for a product within the displayed LOV: To search for a product in the LOV, enter the appropriate words or portions of words in the search fields and select **Search**. A new window opens with a list of found products. Select a product using the appropriate radio button, or, to return to the previous screen, right-click your mouse and select **Back** to return to the LOV.

- c. From the drop-down list, choose the **Version Number** of the product, if known.
- d. From the drop-down list, choose the **Problem Code**, if known.
- e. The **My Help Desk** area is used only if your company has an internal help desk and you are required to enter a help desk number.
- f. From the drop-down list, select an **Urgency**. If you are requesting information or a phone call, select RFI Only.
- g. In the **Summary** text field, enter a summary of the problem or expected resolution.
- h. Select a **Note Type** for your Service Request.
- i. Enter more details about the problem or expected resolution in the **Service Request Note** area. Try to keep your description to about 20 lines of text in the box.
- j. Optionally, attach a file to your Service Request:

In the **Attachments** area, select **Go**. In the **Add Attachment** screen, enter the filename (include the file extension) and click **Attach**. To attach a file by locating the file on your computer, select **Browse** and follow your operating system directions for attaching a file. If the file successfully attaches, you will receive a confirmation message. There is no limit to the size of the file you can attach.

5. Select **Continue**.
6. Optionally, select **Search Knowledge Base** to perform a keyword search based on the description you entered in the Summary of your Service Request. In the list of results, you can view the problems/solutions listed or click **Continue** to continue submitting the Service Request.

7. In the **Verify Service Request** screen, verify that you have entered the information correctly. Select **Modify Section Above** to modify the details you have entered.
8. Select **Submit Service Request** to submit the request. If the submission was successful, the **Confirmation of Service Request** screen displays. Make a note of the Service Request Number (you can also print the details).
9. Optionally, to have the confirmation information sent to you via e-mail, click **Email this to me**. **Note:** You must have a valid e-mail address set up in your [User Profile](#) in order to receive Service Request e-mails. (Oracle iSupport utilizes Oracle Workflow Mailer to process e-mails; consult your information systems administrator for troubleshooting assistance.)
10. Optionally, to enter additional information about the Service Request, select the underlined **Service Request Number** link or select the **Service Request Details** button.

3.4 Setting up a Service Request Profile

A Service Request Profile allows you to associate a collection of information (such as account number, contact information, or product details) with a Service Request at the time of submission. You can set up as many profiles as you wish. Follow the steps below to create a profile.

1. Within Oracle iSupport, navigate to **Support > Create Request > Add**.
2. Enter a name for the profile in the **Service Request Profile** field.
3. In the **Create Service Request Profile** screen, provide the information you wish to comprise the profile. See [Creating Service Requests](#) for information on the fields on this screen.

3.5 Editing a Service Request Profile

Follow the steps below to edit a Service Request Profile.

1. Within Oracle iSupport, navigate to **Support > Create Request**.
2. In the **Create Service Request** screen, select a profile to edit from the drop-down list and select **Edit**.
3. Edit the profile information. See [Creating Service Requests](#) for details about the fields in this screen.
4. Select **Save**.

3.6 Deleting a Service Request Profile

Follow the steps below to edit a Service Request Profile.

1. Within Oracle iSupport, navigate to **Support > Create Request**.
2. In the **Create Service Request** screen, select a profile to delete from the drop-down list and select **Edit**.
3. Select **Delete**.

3.7 Viewing Existing Service Requests

Use the steps below to view a list of your existing Service Requests.

1. Within Oracle iSupport, navigate to **Account > Service Request** or **Support > View/Update Requests**. You also can select from a list of Service Requests on your Homepage, if your system administrator has Service Requests set up as a content selection item and you have chosen to display the content in a bin on your Homepage.
2. To view details about a Service Request, click on the underlined **Request Number** link.

3.8 Escalating Service Request Status

Use the procedure below to escalate the status of a Service Request.

Prerequisite: You have created a Service Request.

1. Within Oracle iSupport, navigate to **Account > Service Request** or **Support > View/Update Requests**.
2. Access the Service Request you wish to escalate by selecting the appropriate underlined **Service Request Number** link.
3. Select **Request Escalation**.
4. In the **Escalate Service Request** screen, select a **New Urgency** from the drop-down list.
5. Select a **Note Type** from the drop-down list.
6. Enter comments in the **Justification for Escalation** text box.
7. **Attach files**, if desired. (See [Creating Service Requests](#) for information on attaching files.)

8. Select **Confirm**. A confirmation message appears.

3.9 Closing Service Requests

Follow the steps below to close a Service Request.

Prerequisite: A Service Request has been created.

1. Within Oracle iSupport, navigate to **Account > Service Request** or **Support > View/Update Requests**.
2. Access the Service Request you wish to close by selecting the appropriate underlined **Service Request Number** link.
3. Select **Close Service Request**.
4. Respond to the confirmation message.

3.10 Adding Service Requests Links to Homepage

Follow the steps below to add a link to a Service Request to your Homepage.

Prerequisite: A Service Request has been created.

1. Within Oracle iSupport, navigate to **Account > Service Request** or **Support > View/Update Requests**.
2. Click the appropriate **Service Request Number** link.
3. Select **Add to Service Request Bin**.
4. A confirmation message appears.

3.11 Searching the Knowledge Base

Oracle iSupport features a knowledge base that allows you to access technical information such as user guides, white papers, and FAQs. Use the procedures below to search for information.

[Searching Using Basic Search](#)

[Searching Using Advanced Search](#)

[Searching the Technical Library \(MES\)](#)

[Searching Common Problems](#)

3.11.1 Searching Using Basic Search

Use the following procedure to perform a basic knowledge base search.

1. Within Oracle iSupport, navigate to **Support > Ask Me** or select **Search for Solutions** from the Homepage.
2. To perform a keyword search, select **Problem Description** and enter the appropriate text in the textbox. To search by solution number, select **Solution Number** from drop-down menu and enter a solution number (or portion of a solution number) in the textbox.
3. Select either or both **Troubleshooting Solutions** and **Documents, FAQs, etc.**
 - **Troubleshooting Solutions** - Searches the Solutions database
 - **Documents, FAQs, etc.** - Searches the Marketing Encyclopedia System (MES)
4. Optionally, refine your search criteria using the following radio buttons:
 - **Match All (AND)** - The search returns only items which match exactly the text in the textbox.
 - **Match Any (OR)** - The search returns items which match any of the text in the textbox.
 - **Fuzzy** - The search returns any items spelled similarly to the text in the textbox. Documents that contain words with high similarity to the query word will be scored higher than those with lower similarity.
 - **InterMedia Syntax** - Use this option to search using InterMedia Text syntax.
 - **Default (THEME)** - Use this option with the ABOUT operator to search on document themes (only supported in English and French). **Example:** To search for documents that are about soccer, use the following syntax: `about(soccer)`. You can also search on structured or unstructured phrases. **Example:** `about(soccer rules in international competition)`.
5. Click **Go** to perform the search.

3.11.2 Searching Using Advanced Search

Use the following procedure to perform an Advanced Search.

1. Within Oracle iSupport, navigate to **Support > Ask Me > Advanced Search** or from the Homepage, select **Search for Solutions > Advanced Search**.
2. Optionally, in the **Search for** drop-down list, choose an area to search - either known Solutions or Statements. Leave set to **All** to search both types.
 - **Statements** are concise descriptions of different aspects of an issue and its resolution.
 - **Solutions** are collections of Statements of varying types
3. Optionally, choose a Solution Type from the drop-down list. Leave set to **All** to search both types.
 - **Common Solution types** are: SCA (Symptom, Cause Action), seeded within Oracle iSupport; PR (Problem Resolution); and QA (Question Answer).
4. In the **Search Criteria** area:
 - a. Optionally, select a **Solution** or **Statement Type** from the drop-down list next to the active radio button. Leave set to **All** to search both types.
 - b. Select a condition from the **Condition** column. Choices are: is, is not.
 - c. Enter text in the **Description** area.
 - d. Select **Find Similar**.
5. To input additional criteria in your search, click **Add Row** and follow Step 4 above. (Use the radio button selection to switch between rows.)

3.11.3 Searching the Technical Library (MES)

Use the following procedure to search for documents published within the Marketing Encyclopedia System (MES).

1. Within Oracle iSupport, navigate to **Support > Ask Me > Technical Library** or from the Homepage, select **Search for Solutions > Technical Library**.
2. Select the **Technical Library** link.
3. A list of documents published in MES will display. Click the underlined link of a document to access it.

3.11.4 Searching Common Problems

Use the following steps to search for commonly-used problems/resolutions.

1. Within Oracle iSupport, navigate to **Support > Ask Me** or select **Search for Solutions** from the Homepage.
2. A list of **Common Problems** displays at the bottom of the page.
3. To view details of one of the common problems, select one of the underlined **Common Problems** links.

3.12 Accessing Account Information

Follow the steps below to access information regarding your Orders, Invoices, Shipments, Returns, or Payments. Related topic: [Creating a Return](#)

1. Within Oracle iSupport, navigate to **Account**.
2. Click the appropriate subtab: **Orders, Invoices, Shipments, Returns, or Payments**. Any data that exists for your account number will display when you select the applicable subtab.

See [Accounts Tab Search Function](#) for information on searching for account information.

3.13 Accessing Contracts Information

Follow the procedure below to access your contracts information.

1. Within Oracle iSupport, navigate to **Account > Contracts**.
2. Click on the underlined **Contract Number** link to view the contract detail.
3. Optionally, click **Refine Contract Search** to enter the advanced search area. In the Advanced Search screen, you can search by Contract Number, Account Number, Status, Expiration Date, Contract Category, Start Date, and End Date.
4. Click **Go** when finished selecting search criteria.

3.14 Creating a Return

Follow the procedure below to create a return.

1. Within Oracle iSupport, navigate to **Account > Returns > Create Return**.
2. Fill in the required information.
3. Select **Order Number** and click **Create Return**.
4. Select the **line items** to be returned.

5. Select **Continue**.

3.14.1 Accounts Tab Search Function

Below are instructions for using the search function accessible from the Accounts tab.

1. To search for orders, invoices, shipments, or payments, use the **Search** drop-down list or the **Date Range** search function. **Note:** You cannot use both search functions simultaneously.

To search using the **Search** box:

1. In the Search drop-down list, select a **search criteria**, for example, Order Number.
2. In the constraint operator drop-down list, select a **criteria**, for example, Greater Than.
3. In the textbox, enter search information that corresponds to the search criteria chosen in the drop-down list.
4. Select **Go** to perform the search.

To search using the **Date Range Search** box:

1. In the **Start Date** field, enter the start date for your search (the date to begin searching from).
2. In the **End Date** field, enter the end date for your search. The search will return all of your inquiries that fall within the two dates.
3. Select **Go** to perform the search.

3.15 Adding Products to the Installed Base

The Installed Base is a repository of your product purchase information, including purchase date, product attributes, and applicable service agreements. Follow the procedure below to add information to your Installed Base.

1. Within Oracle iSupport, navigate to **Products > Add Product**.
2. Enter the name of the product in the **Product** field and the product number in the **Product Number** field. To select from a List of Values (LOV) for these fields, select **Go**, choose the appropriate radio button, and click **Submit**.
3. Optionally, select a **Revision Number** from the drop-down list.

4. Enter the serial number of the product in the **Serial Number** field (see note in Step 5 below).
5. In the **Quantity** field, enter the number of pieces in inventory.
Note: If a product is serialized (has a serial number), you cannot change the quantity. If it is not serialized, you can change the quantity but you cannot to change the serial number.
6. Select a **Unit of Measure** from the drop-down list.
7. Optionally, from the drop-down lists, a **System** and a **Type**.
8. In the **Status** drop-down list, choose a status.
9. In the **Configuration Type** drop-down list, choose a configuration type.
10. Optionally, enter any comments in the **Notes** area.
11. In the **Address** area, click **Go** to retrieve a LOV for available addresses. Select the **Address** where the product is installed and select **Submit**.
12. In the **Date** field, use the calendar icon to select the install date.
13. In the **Time** field, select a time, if appropriate.
14. In the **Contacts** area, use the drop-down list to select a contact. Seeded defaults are: Party and Employee.
15. To choose a **Contact** from a list of available profiles, click **Go**. In the list of contacts, select the appropriate radio button, and click **Submit**.
16. In the **Type** field, choose the appropriate **Contact Type**. Seeded defaults are: Technical, Service Administration, Bill to, and Ship to.
17. Optionally, to remove a contact from the **Contacts** area, select the **Remove** column checkbox adjacent to the appropriate contact and click **Submit**.
18. When finished entering the required information, click **Submit**.
19. A verification message appears. Select **Continue**.

3.16 Viewing the Installed Base

The Installed Base is a repository of your product purchase information, including purchase date, product attributes, and applicable service agreements. Follow the procedure below to view product information in your Installed Base.

1. Within Oracle iSupport, navigate to **Products > Summary**.

2. A list of products in the Installed Base will display. To view details of a product, select the underlined **Product Description** link.
3. To search for a product, select **Refine Search Criteria**. Enter any known information into the search fields and select **Submit**.

3.17 Running Products Reports

Use the following steps to run a report on a specific product.

1. Within Oracle iSupport, navigate to **Products > Report**.
2. Next to the **Product** field, click **Go** to return a product List of Values (LOV).
3. Select a radio button next to the appropriate product and **Submit**.
4. In the **date range** fields, use the calendar icons to select dates from which to include product data.
5. Optionally, select a **Configuration Type** from the drop-down list. Defaults are: As Ordered and As Maintained.
6. In the **Display Options** area, select a display option. Choices are: Top Level Product Only, Top Level Products and Subproducts, Specific Product, and Specific Product and Subproducts.
7. Select **Submit**.

3.18 Viewing Forums

Follow the steps below to view a Forum.

1. Within Oracle iSupport, navigate to the **Forum** tab.
2. In the **Category** list, categories containing subcategories or Forums show a plus sign (+) in the adjacent column. To expand the category listing and show the available subcategories, click the plus-sign next to the category name.
3. Root-level Forums will display an underlined link. Click the link to enter the Forum.

3.19 Posting Messages to Forums

Follow the steps below to post a message to a Forum.

1. Access a Forum using the procedure detailed in [Viewing Forums](#).

2. To post to a message that is a reply to the message, click on the message to view it, and then click **Reply**.
3. Fill in the **Subject** name and type your message.
4. Click **Post**. Your message will be stored underneath the message you are replying to.
5. To have your message display at the root level of the category, click **New Thread** and follow Steps 3 and 4 above.

Note: Any information you have entered in the **User Signature** textbox in the **General Preferences** area (see [Changing Personal Profile Information](#)) will display when you post to Forums.

3.19.1 Searching within Forums

Follow the guidelines below to use the Forums search function. (Related topic: [Search Results](#))

1. Within Oracle iSupport, navigate to the **Forum > Advanced Search**.
2. 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.

3. Select **Search**. The application will return a list of messages matching your search criteria.

3.19.1.1 Search Results

Search results are organized into a table with the following 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.

3.20 Changing Personal Profile Information

This topic group provides information on changing your personal profile data, including:

[Changing Your Password](#)

[Changing Your Contact Information \(including e-mail\)](#)

[Setting Your General Preferences](#)

3.20.1 Changing Your Password

Follow the steps below to change the password you use to log on to Oracle iSupport.

1. Within Oracle iSupport, navigate to the **Profile** button at the top of the screen.
2. Select the **Personal Profile** link.
3. Enter your current password in the **Current Password** field.
4. Enter the new password in the **New Password** and **Re-enter New Password** fields.
5. Click **Update**.

3.20.2 Changing Your Contact Information

Follow the steps below to change your contact information.

1. Within Oracle iSupport, navigate to the **Profile** button at the top of the screen.
2. Click the **Personal Profile** link.
3. To change your e-mail address, enter the new e-mail address in the **E-mail Address** field and click **Update**.
4. To change other contact information, such as your address, select the **Contact Information** link, enter the new information, and click **Update**.

3.20.3 Setting Your General Preferences

Follow the steps below to change your general preferences. All of these steps are optional.

1. Within Oracle iSupport, navigate to the **Profile** button at the top of the screen.
2. Click the **General** link.
3. Use the **General Preferences** screen to set the following:
 - **Default Account Number** - Select the default account number you wish to appear in any Oracle iSupport screens that display or utilize account numbers.
 - **Enable Email Subscription** - Check this box if you wish to enable the function of having the contents of your Homepage e-mailed to you.
 - **Email Interval** - Select the time interval between subscription e-mails.
 - **User Signature** - Enter any text in the text box which you wish to display when you post messages to Forums.
4. Select **Update**.

