Oracle® Support

Concepts and Procedures

Release 11*i*

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Oracle Support Concepts and Procedures, Release 11*i*

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Oracle Support Concepts and Procedures, Release 11*i*

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Preface

Audience for This Guide

Welcome to Release 11*i* of Oracle Support Concepts and Procedures.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- ***Oracle Support***

  If you have never used ***Oracle Support***, Oracle suggests you attend one or more of the ***Oracle Support*** training classes available through Oracle University.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide.*

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use ***Oracle Support***.

- Chapter 1 provides overviews of the application and its components, explanations of key concepts, features, and functions.
- Chapter 2 provides process-oriented, task-based procedures for using Oracle Support service requests to perform essential business tasks.
- Chapter 3 provides process-oriented, task-based procedures for using the tools menu that is available from the Service Requests window.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at http://www.oracle.com/accessibility/.

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of ***Oracle Support***.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Support shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use ***Oracle Support***.

You can read the documents 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 a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of ***Oracle Support*** (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle Support Implementation Guide

This guide provides information required for implementing and setting up Oracle Support.

Oracle Customer Care Concepts and Procedures

This guide describes how to use Oracle Customer Care. Oracle Customer Care provides the functionality for using the Contact Center, Relationship Plans and tracking critical customers.

Oracle Customer Care Implementation Guide

This guide provides information required for implementing and setting up Oracle Customer Care.

Oracle Service Implementation Guide

This guide describes how to implement and setup Oracle Service. Oracle Service provides the functionality required for Counters and Charges.

Oracle Service Concepts and Procedures

This guide describes how to use Oracle Service. Oracle Service provides the functionality required for Counters and Charges.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes.You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the ***Oracle Enterprise Installed Base*** implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master ***Oracle Enterprise Installed Base*** and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization’s structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep ***Oracle Enterprise Installed Base*** working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracl*eMetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracl*eMetaLin*k, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

Alerts: You should check Oracl*eMetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

1

Understanding Oracle Support

This chapter provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle applications.

The following topics are covered:

- Overview of Oracle Support
- Integration with Other Oracle Products
- Key Features

1.1 Overview of Oracle Support

Customers contact your support organization via phone, e-mail, or the web when they experience difficulties using or understanding the product, or with the way the product functions. In response, a support agent creates a service request, or if there is a self service support application, the customer logs a service request himself.

Oracle Support allows an organization to manage customer requests for service assistance. A service request is a report of a specific problem that requires support assistance to resolve. The Service Request module is integrated with a powerful Knowledge Management module so that you can leverage existing knowledge within the organization and build your solutions knowledge base by channeling information you collect while responding to service requests.

Oracle Support categorizes each customer request for service into user-definable service request types such as product complaints, field failures, and product inquiries. Service requests are not limited to functioning customer products, since you can log requests for non-product issues such as clarification of documentation, resolution of implementation issues, and product upgrade information.

Additional customization capability is provided by allowing the Service Request type to be mapped to the user responsibility. The mapping of a service request type to a responsibility also allows for other applications that use service requests to display request types that are relevant to the request context.

While logging service requests, you can assign an urgency and severity status for each request. An urgency reflects the service request from the caller's view of the event, while the severity reflects the support agent's interpretation of the event. Setting these attributes allows a timely resolution for each service request.

In the service request setup forms, you can fully define your service requests by Type, Status, Urgency, Severity, Problem, and Resolution codes. Rather than displaying all possible problem codes available, Oracle Support restricts these codes based on Item and an Incident type. Each code serves to refine the service request definition and aids in problem trend analysis and resolution.

1.2 Integration with Other Oracle Products

Oracle Support manages the business processes involved in the cycle of providing customer support. It is integrated with a number of Oracle applications.

1.2.1 CRM Foundation

Oracle CRM Foundation is a set of application components that can be used by all CRM modules. A description of how Oracle Support uses the CRM Foundation applications follows.

1.2.1.1 Resource Manager

Resource Manager is a single repository for defining teams and groups of people or any other type of resources such as equipment and venues. Oracle Support uses Resource Manager for assigning service request tasks to people.

1.2.1.2 Tasks

In Oracle Support, tasks are created to assign work that is related to service requests. Service requests can have an unlimited number of tasks to represent what has been done or has been scheduled to be done to resolve the service request. For each task, you can specify an owner and multiple assignees, a status, a task type, start and end dates and times, and free-form text describing the task. Additionally, you can use task type as a parameter to route tasks through a separate workflow-based resolution process analogous to the workflow process used for service requests.

1.2.1.3 Assignment Manager

Assignment Manager can determine the best resource to be assigned to service requests and tasks based on territories, availability and skill set. Oracle Support uses this engine to assign unassigned tasks and service requests to a resource or a group of people. In this release of Oracle Support the Assignment Manager integration is enhanced so that the assignment of a service request to a group or individual owner is automatic, and based on a pre-defined qualifier in the Assignment Manager. Additionally, an Assignment Manager option at the Individual Owner level is now used to qualify the pool of resources within the associated group. The Assignment Manager can be run at user-specified intervals to identify and assign unassigned service requests and tasks.

1.2.1.4 Territory Manager

Territory Manager provides an infrastructure to define territories based on flexible criteria, such as geography, zip code, area code, etc. Assignment Manager uses territories during the assignment process.

1.2.1.5 1-to-1 Fulfillment

This engine is designed to support high volume electronic fulfillment of documents. Oracle Support uses 1-to-1 Fulfillment to provide copies of service requests to customers via email or fax.

1.2.1.6 Escalation Manager or Business Rule Monitor

This engine provides the workflow capabilities for all CRM modules to model business rules, monitor the completion of tasks, and escalate automatically when a business rule is violated. Through a Graphical User Interface users can create exception conditions, which result in automatic escalations. Users can also choose to escalate tasks or service requests manually on a case by case basis. Oracle Support uses Escalation Manager to ensure that service level agreements are met.

1.2.1.7 Interaction History

This module provides the CRM suite with a common framework for capturing and accessing all interaction data associated with customer contacts. You can record all customer interactions for each service request by logging all incoming and outgoing calls and details associated to the calls.

1.2.1.8 Notes

The Notes infrastructure enables the entire CRM suite to create, maintain and share notes related to customers, opportunities, service requests and other business objects. Oracle Support uses notes in service requests to document service request activity and to search and contribute to the knowledge base.

1.2.2 Charges

Using the Charges capability, a service organization can bill customers for services provided in response to support service requests, field service requests or depot repairs. Charges also provide the functionality of creating a Return Material Authorization (RMA) to return a defective product for repair, loaner or replacement. Charges created for a service request are processed by Oracle Order Management and Oracle Receivables.

1.2.3 Contracts

Contract information describes those services to which a customer is entitled. Integration with Oracle Contracts allows service entitlement, discount calculation and response time calculation during the logging of a service request.

1.2.4 Counters

From within service requests you can update any Counters associated with a specified product, installed base item or product. An example of a usage for counters is a service contract for a copy machine where the contract charges depend on the number of copies that have been generated.

1.2.5 Customer Care

Customer Care provides the ability to manipulate customer data, track critical customers and relationship plans.

The integration of Oracle Support with the Customer Profile feature of Oracle Customer Care enables the support agent to make intelligent decisions as to the provision of support to customers. The profile contains summarized customer information and can be used to drive workflow designed to deliver superior customer service.

Customer information is entered in the Customer Care Contact Center and can be viewed from the Service Requests window. The Contact Center can be accessed from the Service Requests window by clicking the Customer button.

1.2.6 Field Service

Oracle Field Service functionality manages the servicing of products at customer sites. While resolving a service request, you can log all labor, material, and expenses incurred in processing the service request using the Field Service Report. These expenses are processed by Oracle Charges.

1.2.7 Human Resources (HRMS)

Employee information is maintained in Oracle HRMS and used by the Resource Manager. Oracle Support uses employee information for assigning service requests and tasks to employee resources.

1.2.8 Install Base

Oracle Install Base stores information about all products that are of interest to the customer. This information can be accessed using the item serial number or by a customer's site identifier. This allows you to identify the nature of the equipment or software before creating a service request.

1.2.9 *i*Support

Oracle *i*Support allows a customer to log, view and update a service request with the support organization through a web interface. Upon receipt of the request, Oracle Support routes the request through the various steps that lead to problem resolution.

1.2.10 Knowledge Management

More than eighty percent of the requests for assistance from customers coming to a customer service center involve problems that have known solutions. Oracle Support uses Oracle Knowledge Management to leverage a knowledge base of previously reported problems and their resolutions. As new service requests are logged, support personnel can search the knowledge base to identify solutions.

1.2.11 Quality

You can set up collection plans in Oracle Quality that capture relevant data as service requests are logged by customer support personnel. Collection plans may capture data related to a customer, product, product line, etc. You can then analyze this data in Oracle Quality to answer queries such as what are the most common problems faced by users, or products which cause the most problems. The captured data can be exported to perform detailed statistical analyses.

1.2.12 Quality Online

Oracle Quality Online is a defect and enhancement tracking application. The integration of the Service Request module with Oracle Quality Online allows you to create a defect or an enhancement from a service request. The service request can be automatically linked to the defect or enhancement for tracking purposes.

1.2.13 Scripting

Oracle Scripting guides the support agent through the process of identifying and resolving the customer's issue. Scripting enables the agent to ask step by step relevant questions even in unfamiliar business contexts.

1.2.14 Telephony Manager

If your customer service center handles a large volume of telephone calls, you can automate your call center by using Oracle Telephony Manager. Based on call characteristics, calls can be intelligently directed to an appropriate agent, who can access information entered by the customer before picking up the phone.

1.2.15 Universal Work Queue

The Universal Work Queue (UWQ) provides a place to view and select support agent work which includes work from various media types such as telephone, email and the web. The UWQ lists all media work (email, outbound calls, inbound calls) and non-media work (Service Requests, Tasks). The Service Request node of the UWQ is comprised of three tiers. The first tier, My Service Requests, displays a list of service requests owned by the user. The second tier, My Group's Service Requests, displays a list of service requests that have no owner and are assigned to the user's Group. The third tier, My Team's Service Requests, displays a list of service requests that have no owner or group and are assigned to the user's Team. The service requests are sorted by severity level.

1.2.16 Workflow

Once service requests are logged, you can route them to service personnel in your organization and move them through a workflow-based resolution process tailored to your own unique business requirements. Using Oracle Workflow, you can implement procedures that automatically notify service personnel about their assignments.

You can define business rules to identify service requests that violate your service standards or response guidelines, and then automatically take corrective actions or escalate those requests to the appropriate person. Based on parameters such as service request type, a service request can follow a resolution process optimized for that situation. You can analyze the exact routing of each service request to identify and eliminate the bottlenecks in your service request resolution process.

1.3 Key Features

The Service Request module helps you to manage customer requests for service in the following ways:

- Record customer information quickly.
- Confirm customer and product information; name, number, product, system, or serial number.
- View a customer profile.
- Alert support agents about critical customers.
- Describe the customer’s request for service.
- Define the service request status, type, severity, and urgency.
- Verify service contract entitlements automatically.
- Assign problem and resolution codes to each service request.
- Link service requests to defects, enhancements or related service requests.
- Search a knowledge base to expedite the resolution of service requests.
- Contribute to the knowledge base.
- View interaction history.
- View notes and saved knowledge base solutions for a service request all at once.
- Create multiple tasks for a service request.

- Assign the appropriate resource to perform the task.
- Provide an audit trail of service request changes.
- Send a service request report by email or fax by using Fulfillment.
- Create a defect related to a service request.
- Create charges related to a service request.
- Find existing service requests by using a comprehensive set of search criteria.
- Escalate a service request.
- Update counters.
- Use Oracle Workflow to automate business processes used during service request resolution.
- Use Oracle Quality to collect quality control information linked to service requests.

1.4 Oracle Support Business Flow

The Service Request window functions as the central reaction point for a customer support agent who needs to respond to a customer request. An interaction between the customer and the support agent results in either an immediate resolution of the problem or a task assignment to qualified individuals. The customer support agent uses several application functions to facilitate a response to a customer problem.

A typical scenario for a customer calling for assistance is given below:

- A support agent accepts a customer call from the Universal Work Queue.
- The agent identifies the customer using the Contact Center and optionally views the customer profile. The agent can update the customer information.
- The agent verifies contract entitlement and logs a new service request, or views an existing service request.
- The agent searches the knowledge base for solutions to the customer problem.
- The agent can create a task from the service request and assign it to himself or to another person in the support organization. The appropriate workflow is launched
- The agent can view the interaction history from service requests for the customer.

- The agent can view the service request log associated with the customer or issue to understand the progress made toward resolution.
- The agent can link the service request to another service request.
- The agent can create a charge line to return a defective product or bill the customer for the services provided.
- If the product is defective, or if it requires an enhancement, the agent logs a defect report.
- The agent can escalate the service request and assign the escalation to an account manager.
- The agent can send another agent a message using the messages functionality of service request.
- If the customer demands a confirmation of the service request, the agents sends a fulfillment request containing the history of the service request to the customer.
- The agent can contribute to the knowledge base after solving the problem.
- The agent can complete a collection plan to capture quality information used to improve business processes.

The overall process that facilitates the solution to a customer problem varies with each instance, but the process always involves a service request.

2

Managing Service Requests

This chapter provides process-oriented, task-based procedures for using Oracle Support to perform essential business tasks.

The following topics are covered:

- Overview of Creating a Service Request
- Accessing the Service Requests Window
- Finding an Existing Service Request
- Accessing Customer Information
- Viewing the Customer Profile
- Verifying Product Coverage
- Creating and Viewing Notes
- Searching the Knowledge Base
- Viewing the Service Request Log
- Managing Service Request Contacts
- Managing Customer Addresses
- Managing Tasks
- Viewing Customer Interactions
- Linking Related Documents to a Service Request
- Viewing Service History
- Printing a Service Request
- Wrapping up a Call

- Contributing to the Knowledge Base
- Closing a Service Request
- Service Request Workflows

2.1 Overview of Creating a Service Request

The first step in solving a customer problem is creating a service request. The customer information is validated and then the support agent opens a customer service request that captures all the problem details.

To create a service request:

1. Navigate to the Service Requests window. See Accessing the Service Requests Window for details.

   If you need to view an existing service request, see Finding an Existing Service Request for details.

2. Access the appropriate information about the contact and customer for whom you want to create a service request. See Accessing Customer Information for details.

   Oracle Customer Support populates the Service Requests window with the customer data logged in the Contact Center.

   Based on the customer location, the time zone field shows the time zone of the customer and also shows the time lag between the customer and the agent.

3. Optionally view the customer's profile to get an understanding of the customer's criticality.

   See Viewing a Customer Profile for details.

4. If the customer issue is about an Install Base item, select the Installed Base check box and verify product coverage. Service requests can also be created for inventory items that are not part of the Install Base.

   See Verifying Product Coverage for details.

5. Select values in the Type, Status, and Severity fields, if they are different than the default values. Default values in these fields are governed by the profiles setup. For more information on profiles, see Setting Up Oracle Support Profiles in the Oracle Support Implementation Guide. Default fields are further described under Service Request Defaults.

6. Open the Workbench tab. Enter a brief description of the customer problem or request in the Request Summary field.
7. You can select values for the Urgency and Problem Code fields. The Problem Code categorizes the type of problem reported in the service request. Urgency is described under Service Request Defaults.
8. The Resolution field can be populated when the service request is resolved.
9. You can select the time frame for the resolution of the problem in the Resolution By field.
10. You can enter a note to further describe the problem.

    See Creating and Viewing Notes for details.
11. You can search the knowledge base to find possible solutions for the customer problem.

    See Searching the Knowledge Base for details.
12. You can view the service request log associated with the customer.

    See Viewing the Service Request Log for details.
13. You can update or add customer contact information.

    See Managing Service Request Contacts for details.
14. You can update customer address information.

    See Managing Customer Addresses for details.
15. You can create one or more tasks and assign the tasks to the appropriate resource.

    See Managing Tasks for details.
16. You can view the interaction history for this customer.

    See Viewing Customer Interactions for details.
17. You can link the service request to a related service request.

    See Linking Related Documents to a Service Request for details.
18. You can view the service history for this product or product/customer combination.

    See Viewing Service History for details.
19. Save the service request.

A Service Request number is assigned and displays in the Request field. You can give this number to the customer as reference.

20. Wrap up the call.

    See Wrapping up a Call for details.

21. When the service request is resolved, you can optionally contribute to the knowledge base.

    See Contributing to the Knowledge Base for details.

22. Close the service request after it has been resolved.

    See Closing a Service Request for details.

Service Request Defaults

Service request default values, specified by user profiles, help you enter service requests quickly. You can set user profiles to default values in the following fields as you enter service requests:

- Type - Categorizes the service request and can be related to relevant status codes and workflow processes.
- Status - Indicates the current state of the service request.
- Owner - Indicates the person who is responsible for resolving the service request.
- Owner Type - Shows the resource category of the Owner and the choices are Employee, Group or Team Resource.
- Group -
- Group Type -
- Severity - Reflects the support agent’s perception of how critical the customer issue is.
- Urgency - Reflects the customer’s perception of how critical the issue is.
- Note Type - Categorizes notes and allows certain notes to be used when searching the knowledge base.
- Note Status - Indicates who has access to view the note and the choices are Publish, Public or Private.
- Knowledge Base Solution Type - Categorizes knowledge base solutions.
- Task Priority - Indicates the relative priority of a task.

- Task Status - Indicates the current state of the task.
- Task Type - Categorizes tasks and is used for linking to workflow processes.
- Task Owner - Indicates the person who is responsible for monitoring the progress of a task.
- Task Owner Type - Shows the resource category of the Task Owner and the choices are Employee, Group or Team Resource
- Task Assignee - Indicates the person who is assigned to do the work in a task.
- Task Assignee Type - Shows the resource category of the Task Assignee and the choices are Employee, Group or Team Resource
- Make Public check box - Allows the service request to be viewed by customers via *i*Support.

You can override these defaults if necessary by changing the appropriate profile options. For more information, see Setting Up Support Related Profile Options in the *Oracle Support Implementation Guide*.

2.2 Accessing the Service Requests Window

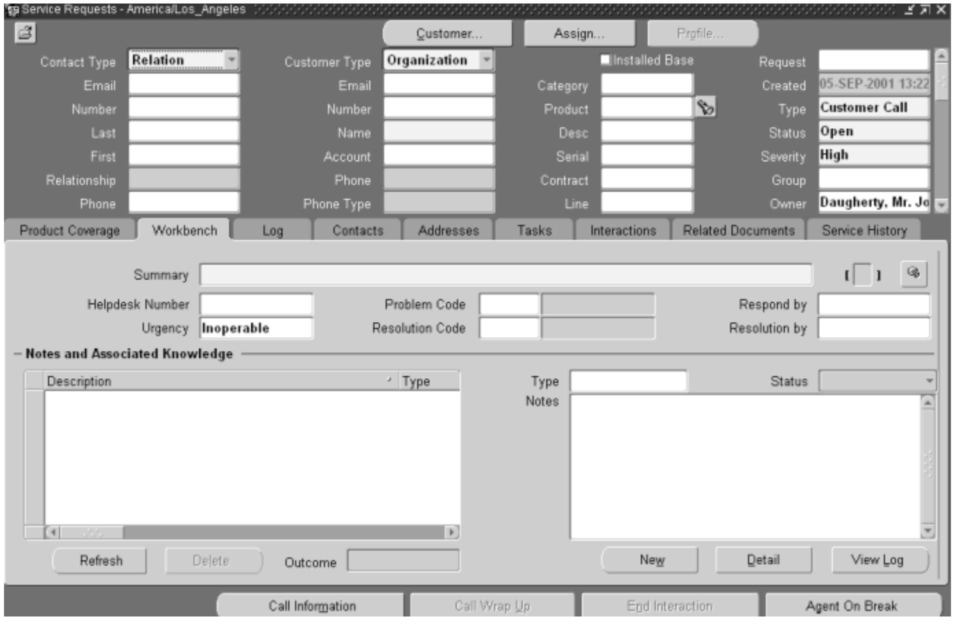
The Service Requests window is the central reaction point for a customer support agent who needs to respond to a customer request. Normally, you use the Service Requests window to create and manage service requests. Service Requests can also be created from the Service Request tab in the Customer Management Contact Center window.

The Service Requests window contains folder block properties which you can use the change the display of the service request fields to meet your specific needs.

To access the Service Requests window:

1. Select the Customer Support Responsibility. The Customer Support Navigator window appears.
2. Use the following navigation path to open the Service Requests window:

   Service Requests—>Create Service Requests



Overview of the Service Request Window

The Service Request header region contains four regions: Contact, Customer, Subject and Request. The Contact region displays the details about the primary contact for the Service Request. The Customer region displays information about the customer for which the Service Request is logged. The Subject region displays information about the product and contract for which the Service Request is logged. The Request regions displays details about the Service Request attributes. To see all of the fields in each region, you must use the scroll bar to scroll down.

The Service Request window contains nine tabs. Each tab allows access to a function that contributes to the process of managing a service request. The support agent can manage customer information, problem details, problem resolution, service history, and task assignment to assist and sustain a support center.

The following list explains the functions supported by each tab in the Service Request window.

Product Coverage

- View and edit product attributes.

- View and select the contract entitlements.

Workbench

- Enter the problem description and notes of various types.
- Search the knowledge base.
- View respond by date and enter expected resolution dates.
- Delete a knowledge link.
- Update a solution with an outcome.

Log

View the history of various events in the lifecycle of a service request.

Contacts

View and select customer contact information for a service request.

Addresses

View and select customer billing, shipping, and installation address information.

Tasks

View, create and assign tasks associated with a service request.

Interactions

View the customer interaction history.

Service History

View the service history of a specific product or component.

Related Documents

View or link related service requests and defects associated with a service request.

Additional functionality related to service requests such as entering a charge, creating a defect, viewing audit history, sending a fulfillment request, and initiating an escalation can be accessed from the Tools menu of the Service Requests window.

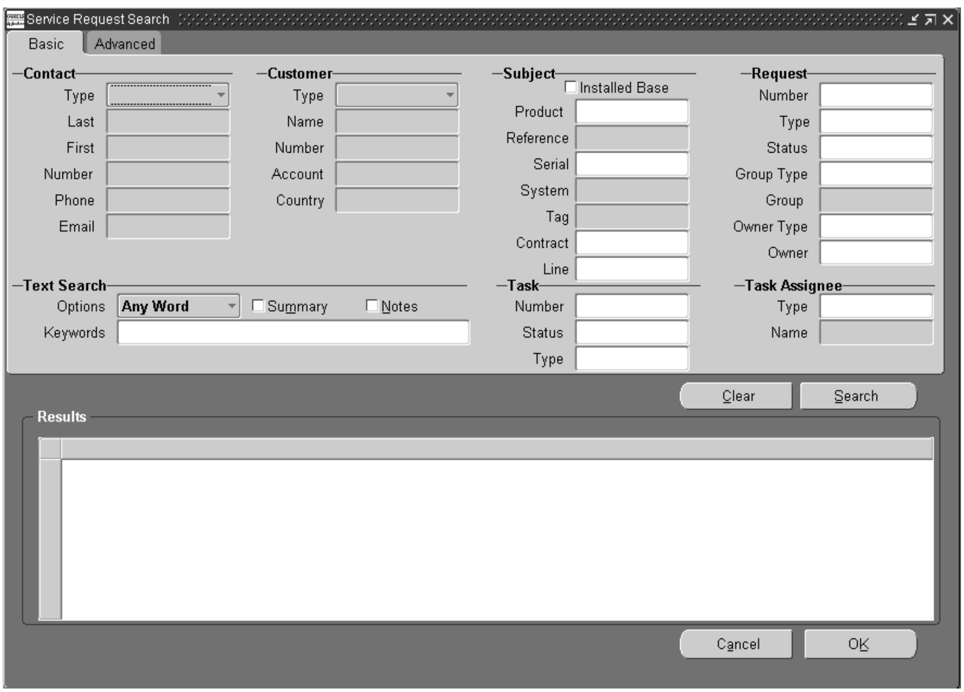
2.3 Finding an Existing Service Request

Use the Find Window to retrieve service requests from the database or product information from the installed base. Oracle Support provides two search levels: Basic and Advanced. Basic search is selected by default.

After executing a search, the service request(s) matching your search parameters are displayed in the results area of the Find window. You can select any of the retrieved service requests and then click OK to view its details in the Service Requests window.

- Using Basic Search
- Using Advanced Search

To find a service request using basic search:



1. Select the parameters based on which you want to search for the service request. You may select from the following parameters:

- Contact Information - You must select a value from the Type list of values to enable the following fields in the Contact region.
  - Number
  - Last Name
  - First Name
  - Phone number
  - Email address
- Customer Information - You must select a value from the Type list of values to enable the following fields in the Customer region.
  - Number
  - Name
  - Account
  - Phone
  - Country
- Subject Information - Check the Installed Base check box to query only from the customer's list of installed products.
  - Product
  - Reference
  - Serial number
  - System
  - Tag
  - Contract
  - Line
- Service Request Information
  - Number
  - Type
  - Status
  - Group
  - Group Type

  * Owner
  * Owner Type
- Task Information
  * Number
  * Status
  * Type
- Task Assignee Information
  * Type
  * Name

2. If you are performing the search using a text string as the parameter:

   a. Select a search option to indicate how the text string you enter in the Keywords field is to be used for the search. This search is not case sensitive. You may select from the following options:

      Any Word: Finds service requests that contain any of the keywords in summary or notes.

      All Words: Finds service requests that contain all the keywords, in any order, in summary or notes.

      Phrase: Finds service requests that contain an exact match as the keywords in summary or notes.

   b. Select where the search is to be performed. The choices are:

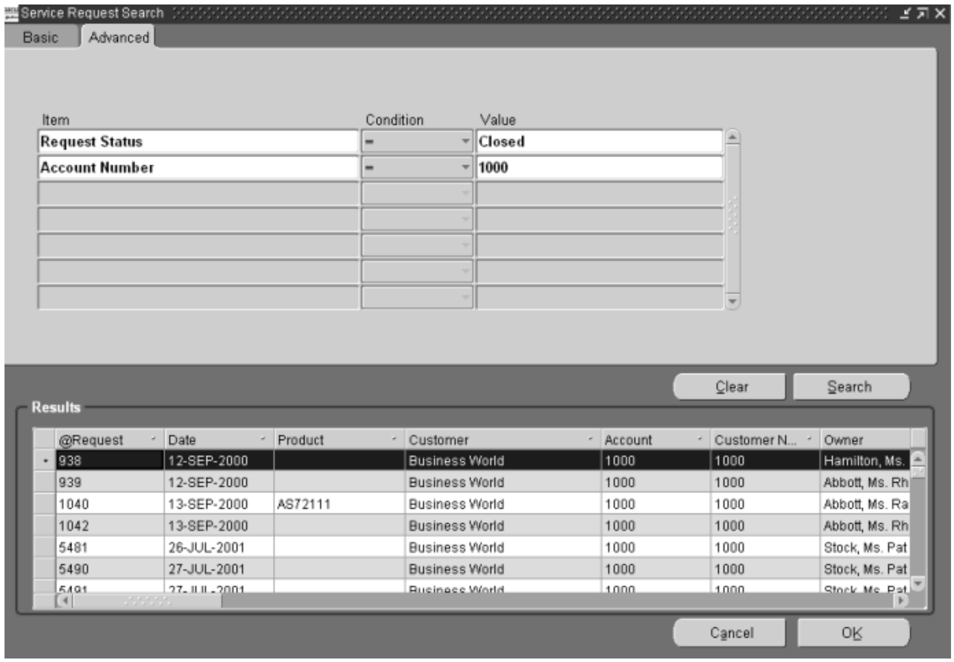
   - Summary check box to search only in the request summary
   - Notes check box to search only in the notes associated with service requests.
   - Both Summary and Notes check boxes to search in both the service request summaries and notes.

   c. Enter the text string to be used for the search in Keywords field.

3. Click **Search** to find matching service request(s) based on the parameters you have specified. Service requests created since the last time the Service Request Synchronize Index program was run are included in the search.

To find a service request using advanced search:

1. Open the Advanced tab.



2. Define the logical condition(s) to be satisfied for identifying and retrieving service request(s). You can build your arguments around customer number, contact name, or severity level. To define an argument:

   a. Select the item for which the argument is to be defined.

   b. Select a logical operator to indicate how the item and value combination is to be used to identify service requests.

   c. Select the value based on which service requests are to be retrieved.

   Note: Each item, condition, and value combination is considered an argument. The AND operator is used in the background to create a complex argument if you define more than one condition. All the conditions set forth by a complex argument must be satisfied for identifying and retrieving service requests.

3. Click **Search** to find matching service request(s) based on the arguments you specified.

2.4 Accessing Customer Information

When creating a service request, you can access customer information by starting with the entry of either the Contact Type or Customer Type fields. Alternatively, you can expedite the entry of service request information by entering information in one of the fourteen service request entry points.

Following are descriptions of the two methods for accessing customer information:

- Accessing Customer Information Using Contact and Customer Type
- Accessing Customer Information Using Additional Entry Points

2.4.1 Accessing Customer Information Using Contact and Customer Type

Oracle Support leverages the customer model which supports the Business to Business (B2B) and Business to Consumer (B2C) model. This approach focuses on relationships as being the key differentiator of a customer. The Service Requests window supports the customer relationship with the use of Contact Type and Customer Type fields. By identifying the correct combination of Contact Type and Customer Type, the application determines which additional fields are required, which fields are optional and which fields do not apply.

You can select a value in either the Contact Type or the Customer Type field first. If you complete the Contact Type field first, the possible combinations follow:

Table 2–1 Possible Contact Type - Customer Type Combinations

Contact Type	Customer Type
Person	Person - Defaults from Contact
Employee	Person - User selects from list of values
Employee	Organization - User selects from list of values
Relationship	Organization - Defaults from Contact list of values
Relationship	Person - Defaults from Contact list of values

For example, if you select a contact type of Person and select the contact name from the list of last names, the Customer Type field defaults to Person and the person information is displayed in the customer fields. If you select a contact type of Relationship, the list of values for the contact last name displays the party with all the relationships. Depending on which value you select, the Customer type field defaults to either Person or Organization.

If you complete the Customer Type field first, the possible combinations follow:

Table 2–2 Possible Customer Type-Contact Type Combinations

Customer Type	Contact Type
Person	Person - Defaults from Customer
Person	Relationship - User selects from list of values
Person	Employee - User selects from list of values
Organization	Relationship - User selects from list of values
Organization	Employee - User selects from list of values

For example, if you select a customer type of Person and then you select a person by customer number, than the Contact Type field defaults to Person. If you want to change the contact, you can change the Contact Type to Relationship or Employee. If you select a customer type of Organization, you can select a customer by number or any other customer field and then select a contact type of either Relationship or Employee.

2.4.2 Accessing Customer Information Using Additional Entry Points

Oracle Support provides fourteen entry points into the service request. An entry point is defined as one field that must be entered with a valid value and based on the information in that one field, several related fields are automatically populated in the service request header. This enables you to quickly access customer information while creating a service request.

The following entry points are available:

- Account
- Contact Email
- Contact Name
- Contact Number
- Contact Phone
- Contract

- Customer Email
- Customer Name
- Customer Number
- Customer Phone
- Employee Number
- Install Base Serial Number
- Reference
- System

For example, if you enter only the Customer Number in the Service Requests window, the following fields related to the customer with this customer number are populated automatically: Contact Name, Contact Phone, Contact Email, Customer Name, Customer Phone, Customer Email, and Account. The following additional fields are populated if only one value has been assigned to this customer: System, Reference Number, Serial Number, and Contract.

2.5 Viewing the Customer Profile

Customer Profile information summarizes customer information and indicates if a customer is critical, thereby helping you make intelligent decisions while providing customer support. The profile entries appearing in the customer profile are typically set up by a system administrator, and contain a set of predefined key indicators.

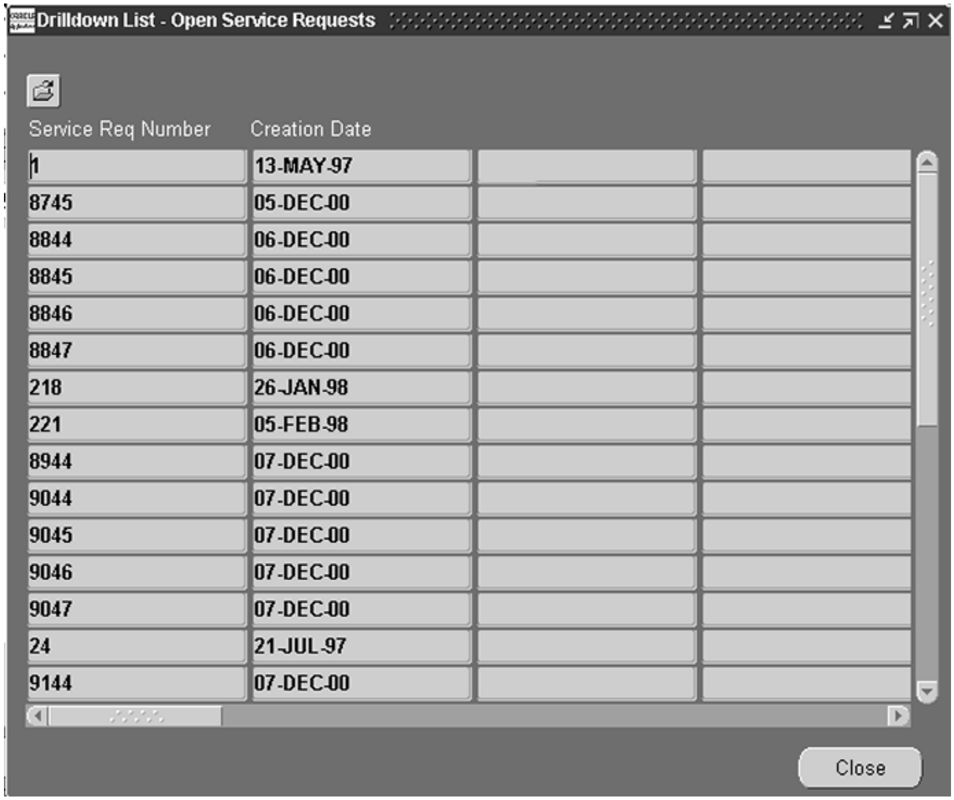
Prerequisite

Customer profiles need to be defined for a customer before they can be viewed in a service request. For information on creating customer profiles, please refer to the *Oracle Customer Care Implementation Guide*.

To view a customer profile:

1. Navigate to the Service Requests window.
2. Create or query a service request.
3. Click **Profile**. The profile window opens and displays the predefined key indicators for this customer.

4. Double-click on a key indicator to view a summary list of what comprises that indicator. For example, double-clicking on Open Service Request (a key indicator) displays the a list showing all open service requests for the selected customer. This list displays information such as the service request number, incident date, problem code and resolution code.



5. Double click on any line to view details of that service request. The Service Requests window containing details of the service request opens.
6. Click **Refresh** in the Profile window to view the latest information for the customer.

2.6 Verifying Product Coverage

The Product Coverage tab allows you to view information about the customer's contractual coverage for the product or service for which the service request is logged. This tab contains information about the product attributes as well as the contracts.

The product attributes and contracts information help you to:

- Confirm the product details with the customer.
- View contract details. While logging a service request, you can look up contracts associated with the customer/site/product to ensure that all contractual requirements like coverage times, response times, effective dates, billing rates and entitlements are met. An organization may or may not enforce contract validation.

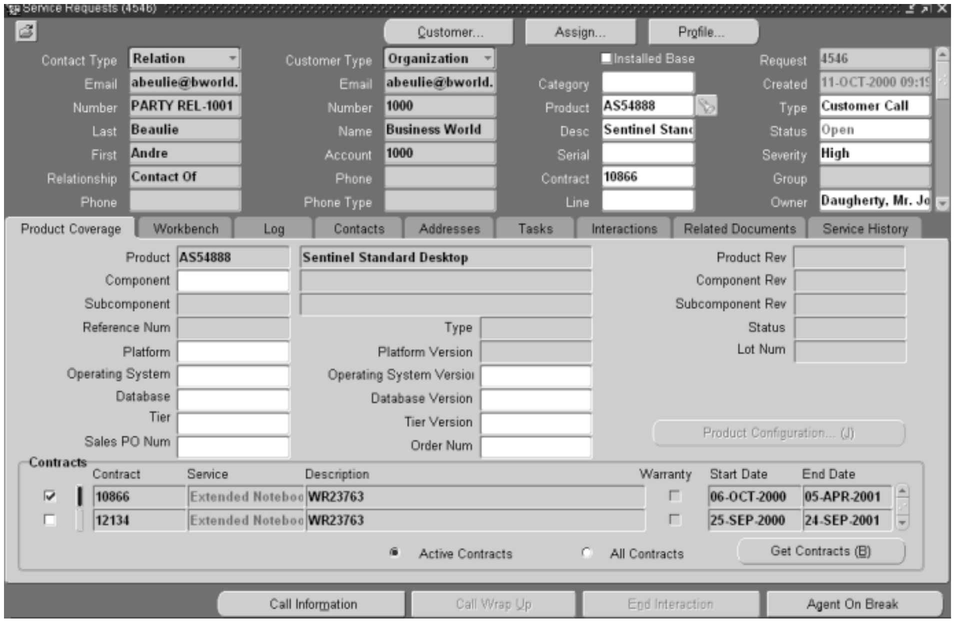
Prerequisite

Customer products, contracts and coverages must be defined before they can be viewed in a service request.

To verify product coverage information:

1. Navigate to the Service Requests window.
2. Access the appropriate information on the caller for whom you want to create a service request. See Accessing Caller Information for details.
3. Select the Installed Base check box if the customer issue is about a customer product. If this check box is selected, the Product list of values displays only the products installed at the customer site, otherwise it displays all inventory items. The System and Reference Number fields are enabled only when the Installed Base check box is selected.
4. If the Installed Base check box is checked, select a product and optionally, a serial number for the product. If you selected the Installed Base check box, you can select a serial number from a list of values. If not, Serial Number is a user enterable text field. Alternatively, click **Find** to search the installed base for customer products.
5. To view product information, open the Product Coverage tab. The fields in the Product Coverage tab are updated to display appropriate product attribute and contract information.
6. To change or add a product related attribute, click **Product Configuration.**

7.



8. The contracts region of the Product Information tab displays the contract information related to the service request being logged. Click **Get Contracts** to view contract information based on the values entered for Customer, Account, Site, Installed Base Product, Item and System fields. The contracts region displays all active contracts available based on the information entered in the service request. To view all contracts, click the All Contracts radio button prior to clicking Get Contracts.

9. Select a contract for service coverage by selecting the Selection check box next to the desired contract row. The date in the Respond By field of the service request is defaulted based on the contract selected.

10. To view coverage information for a particular contract, double-click the contract number in the Contract region. The Service Contracts Coverage window opens.

    - The Service Contracts Coverage window displays details like coverage name, description, type, business processes to which this is attached, preferred engineers as per contract, effective dates and any exception coverage.

- The Coverage Times tab shows service coverage hours by weekday.
- The Reaction Times tab displays reaction time according to the severity of the problem.
- The Billing Types tab shows the billing type, rate, and percentage coverage. For labor billing type, you can also view bill rate and percentage of discount, if applicable on the rate.

11. Close the Service Contracts Coverage window to return to the Service Requests window.

2.7 Creating and Viewing Notes

Notes in a service request are used to document the description and progress made toward resolution of the customer issue. Notes are used to capture details to search the knowledge base for solution statements. Notes are also used to create new solution statements to contribute to the knowledge base.

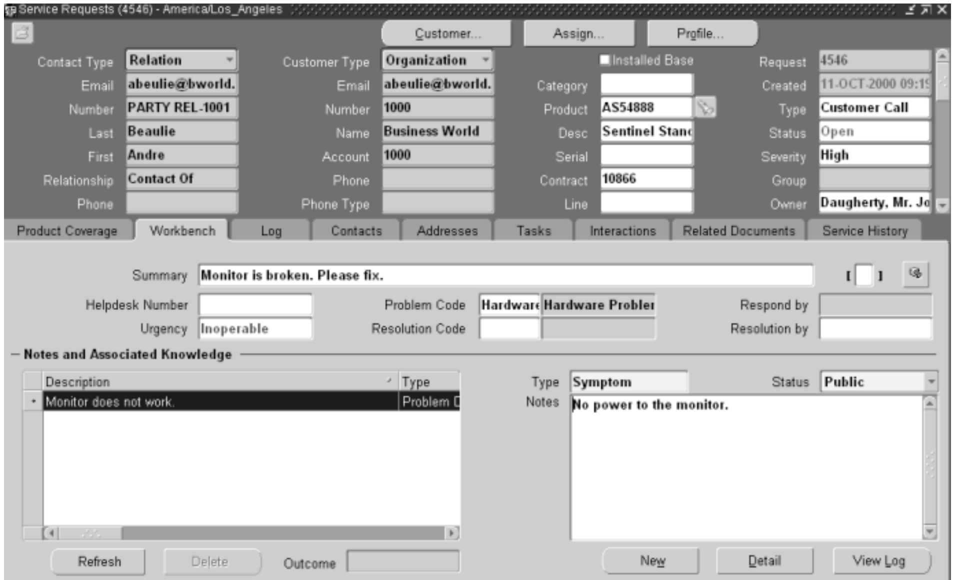
Access to view notes in a service request is available at three levels:

- Private - Only the support agent who created the note can view the note.
- Public - All internal employees can view the note.
- Publish - All internal employees can view the note and customers can view the note through *i*Support.

If you print a service request, you have the option of selecting which note status should be included on the printout. You can update the status of an existing note.

To create a note:

1. Navigate to the Service Requests window.
2. Create a service request or query an existing service request.
3. Open the Workbench tab.



4. Select the type of note you want to create in the Type field. Certain note types must be used if you want to search the knowledge base. Typical note types used for searching are Symptom, Cause, Action, Problem and Solution.

5. You can update the note type of a previously created note, if needed.

6. Select the appropriate status for the note in the Status field.

7. Enter a brief description of the note in the Note field.

8. If you want to enter more note text, click **Details** to open the Note Details window. You can additional text up to 32 K in size. Click **OK** to return to the Notes window.

9. Save the note.

10. The note appears in the spreadtable in the Notes and Knowledge base elements region.

11. If you want to specify Related To information for the note while creating a note, you can access the main notes window by selecting the Notes option on the tools menu.

This Notes window allows you to create a note while specifying Related To and Related Values. If a note is created from this window, the Related To field defaults to Service Request and the Related Value defaults to the service request number.

12. The Notes windows displays notes in two tabs: Notes and Summary. The Notes tab displays the notes in a summarized list form in a spreadtable. The summary tab displays the notes as text in a chronological or reverse chronological order. You can change the chronological view by clicking on the Latest First check box.

13. To find a note:

    a. Open the Notes window.

    b. Click on the Find tool bar button to open the Notes Find window. Enter the appropriate search parameters and click **Find**.

2.8 Searching the Knowledge Base

While logging a service request, you can search for a solution to the customer issue in the knowledge base if you are using Oracle Knowledge Management. The knowledge base is a repository of solution sets that have been previously contributed.

The knowledge base search can be based on:

- Keywords
- Similar statements
- Symptoms, Causes, Actions or other defined knowledge statement types
- Solution sets

Knowledge solutions and statements are version controlled. You can enhance or modify solutions or statements in the new Knowledge Management HTML user interface.

Prerequisite

Oracle Knowledge Management System must be properly set up.

To search the knowledge base:

1. Navigate to the Service Requests window.

2. Create a service request or query an existing service request.
3. Click the Search Knowledge Base button on the Workbench tab. This button is located in the upper right corner of the Workbench tab. The Knowledge Base Search window opens.
4. The following information from the service request is passed to the Knowledge Base search window.
   - If your note was saved in the service request using a Note Type that has been mapped to Knowledge Management, then the note text is defaulted to the search screen. Note types are setup in the Knowledge Management application.
   - Product and Platform
   - Service Request summary is defaulted into the Keywords for searching.
5. You can view the details of solutions found and select the solutions that are useful for the resolution of your service request.

   You can link relevant solutions to your service request so they are available for viewing in the Workbench tab and the Log tab of the service request. You can also make a local copy of a solution and make modifications to it. These statements are stored as Notes and are not be available in future Knowledge Base searches.
6. If you do not want a solution to be linked to your service request, you click **Delete Link**. If a solution does not solve the customer's issue, you can check the Did Not Solve check box.

For additional information about Knowledge Management, refer to the *Oracle iSupport Concepts and Procedures Guide*.

2.9 Viewing the Service Request Log

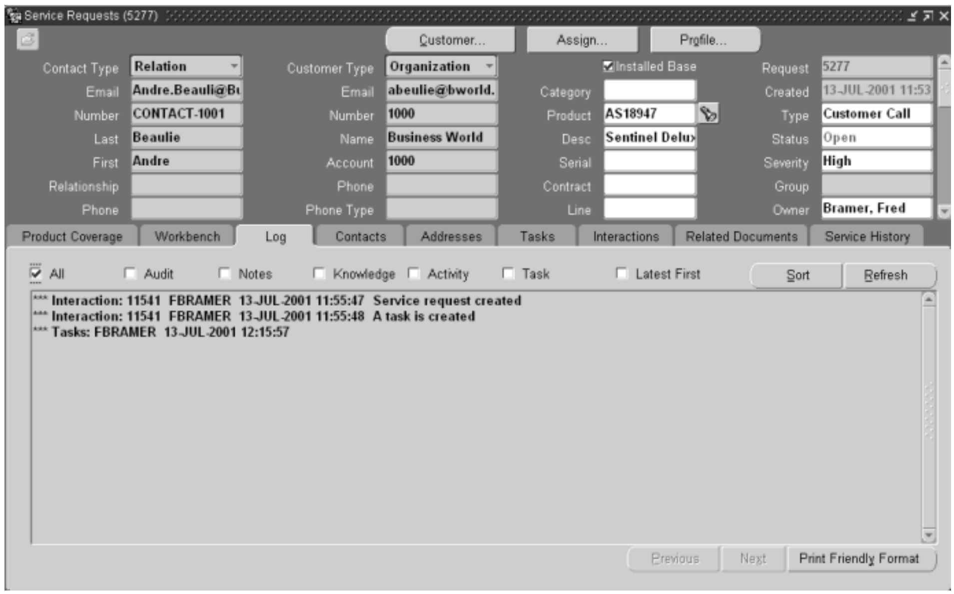
The Log tab provides a centralized location for viewing the history of a service request. It displays a chronological view of all activities, tasks and notes entered for a service request, as well as all changes to the audited fields, and all knowledge notes linked to this service request.

Prerequisite

You must save the service request before you can view the log.

To view the customer contact log:

1. Navigate to the Service Requests window and query an existing service request.
2. Open the Log tab. This tab displays the history associated with the service request in a scrollable window.



3. Select one of the following check boxes to display the type of information you want to view:
   - All - displays all activities.
   - Audit - displays changes to the Type, Severity, Status, Summary, Group Type, Group, Individual Type, Individual and Product fields.
   - Notes - displays all notes.
   - Knowledge - displays knowledge documents linked to this service request.
   - Activity - displays all interactions
   - Task - displays all tasks.
   - Latest First - reverses the chronological order.

4. Click **Refresh** to view the updated activity.
5. If you want to print the activity shown in the log, click **Print Friendly Format**.

2.10 Managing Service Request Contacts

Companies often provide multiple contacts for a service request. The Contacts tab in the Service Requests window provides a central repository for obtaining information on how to contact a specific person related to the service request. You can also use the Contacts tab to designate a primary contact for the service request. You must use the Customer button to navigate to Contact Center if you want to add new contact information.

Prerequisite

Contacts must be defined before they can be associated with service requests. To update existing contact information or create new contacts, you can access the Contact Center by clicking the Customer button from the Service Requests window or using the Quick Menu to navigate to the Contact Center window.

To associate an additional existing contact to a service request:

1. Navigate to the Service Requests window and create a service request or query an existing service request.
2. Open the Contacts tab. Contact information from the service request is displayed.

3. To associated additional contacts to this service request, select the contact type and the contact's first and last name from the list of values. The value in the Contact Type field defaults from the Default Contact Type profile option.

4. You can indicate who the primary contact is by checking the Primary check box next to the desired contact. This action changes the primary contact in the Service Request header and defaults the selected contact point information into the appropriate fields.

5. Save the service request. The contact details are saved along with the service request.

To create a new contact from a service request:

1. Navigate to the Service Requests window and create a service request or query an existing service request.

2. Click **Customer** to open the Contact Center window.

3. Click **New** to open the Caller Information window.

4. Choose a caller type in the Caller Type field.

- To create an organization for a B2B customer, select Organization as the caller type.
- To create a person for a B2C customer, select Person as the caller type.
- To create a contact for a B2B customer, select Caller as the caller type.

The fields available to you depend on your selection in the Caller Type field. All selections result in the display of Phone, Party, Account Name and Email fields. If you select Organization as the Caller Type, the Organization and Relation fields are displayed. If you select Person or Contact, the fields related to the caller’s name are displayed.

5. If you are creating a new caller for a customer, enter a relation. Also choose the party you want to associate with the caller. If you forget to enter the relationship during the creation step, the party relationship will not get created and you must create the relationship from the Contact Center Relationship tab.
6. Optionally enter an email address in the Email field.
7. Select the Account check box if you want to create an account for this caller.
8. The Address field is actually a Flexible Address format. When you click on the field, the address flexfield window appears where the user can enter all the address attributes such as Address Lines, City, State, Zipcode. The address flexfield attributes are based on what you define in the setup for each country. The default for the New window is US. Refer to the *Oracle Customer Care Implementation Guide* for setup of address flexfield.
9. Optionally enter effective dates in the Effective From and Effective To fields.
10. Click **OK** to save the information to the customer master.
11. The system automatically generates and assigns a Party Number to the caller. If the Account check box is selected, an account is created for the party.
12. Close the Contact Center to return to the Service Requests window.
13. Now you can select your new contact from the Last name list of values.

2.11 Managing Service Request Customer Addresses

The Addresses tab contains customer information for installation, billing and shipping addresses.

To record customer address information:

1. Navigate to the Service Requests window and query an existing service request.
2. Go to the appropriate region in the Addresses tab: Bill To, Ship To or Installed At.

   If the service request is logged against a customer product, the Installed At address is taken from the Install Base application. You can override the address with an address from any related customer.

3. Select the appropriate party from the Party list of values. The Party list of values displays all related parties, filtered by the customer type selected in the service request header.
4. Select an address from the list of values
5. Save your work to record the address information.

To add a new customer address:

1. Open the Contact Center window by clicking the Customer button or using the Quick Menu from the Service Requests window.

2. Open the Addresses tab in the Contact Center window.
3. Click the Add New Record icon in the tool bar.
4. Select the appropriate option from the View By dropdown box. The choices are Organization, Person, Caller and Relationship.
5. Select a status of Active.
6. Enter a descriptive name to describe the location for the party in the Site Name field. An example of site name is 'HQ' as the site name for the address representing Oracle's headquarters.
7. Optionally enter a mailing name in the Addressee field. An example of an addressee is 'Attention: Accounts Payable'.
8. You can select an existing address in the Address1 list of values or you can create a new address. This list of values contains all addresses in HZ_LOCATIONS. If you select an existing address, the remaining address fields are automatically populated. If the location is not available from the list of values, you can create a new location by entering the appropriate values in the remaining applicable address fields.
9. Save your changes.
10. You can create a usage for each address, such as Bill to or Ship to. Select a usage from the Usage list of values and a status from the Status list of values.
11. Save your changes.
12. In the Primary Usage region, you can assign an address as primary for each usage. Select a usage from the Usage list of values and then select the address you want to be primary for this usage from the Address list of values.
13. To associate a contact point with an address site, click **Site Contact Points**. The Site Contact Points window opens.The party address is displayed by default. Select a contact method from the Contact Method list of values. All contact methods are seeded values. The valid contact methods are Phone, Web and Email, EDI, and Telex.
14. The next fields vary depending on the contact method you select:
    a. If you select Phone as the contact method, select a value from the Type list of values. Enter values in the Country Code, Area Code, Value and Ext fields, if applicable. The Value field is for the main phone number and the Ext field is for the phone extension.

b. If you select Web as the contact method, the form takes you to the Value field for entry of a URL.

c. If you select Email as the contact method, the form takes you to the Value field for entry of an email address.

d. If you select EDI, enter the appropriate value in the Value field.

e. If you select Telex, enter the appropriate value in the Value field.

15. Optionally enter values in the Best Time From and Best Time To.

16. If you do not want a contact method to be used, check the Do Not check box.

17. Save your work.

2.12 Managing Tasks

The Service Requests window provides the functionality for creating, assigning, managing, and prioritizing various tasks through its Tasks tab. A task is a unit of work that needs to be completed to resolve a service request. You can associate task types with workflows to control the business flow of the task.

After you create a service request, you can create tasks for yourself or assign tasks to other resources to direct the reactionary response for resolving the customer issue. For example, you can create a task to call back a customer or a task to dispatch a service engineer to make a repair at a customer site.

You can create a task by manually entering all the relevant information or by using a template.

See Also:

- Creating a Task Manually
- Creating a Task Using Task Template
- Entering Task Details
- Defining Resource Requirements
- Setting Task Dependencies
- Linking Tasks to Source Documentation
- Setting Recurrence Schedule
- Viewing Audit History for the Task

2.12.1 Creating a Task Manually

Prerequisite

If you want to launch a workflow, the workflow must be associated with the task type in use.

To create a task manually:

1. Open the Task tab in the Service Requests window.

2. Values in fields such as Status, Type, Priority, Owner Type, Assignee Type, and Owner are displayed by default based on profile options. You can use the list of values associated with these fields to change the default values.

   The Task Type can be used to associate this task with a workflow. The Task Type list of values shows only those task types which are associated with service requests.

3. Enter a name for the task in the Name field.

4. In the Desc. field, enter a brief description about the task.

5. If needed, in the Parent field, select a task to which this task is to be linked. Normally, you would select a parent task if the task you are creating is a follow up on another task.
6. Optionally select the Restrict Closure flag. A task with restricted closure means that if this task is related to a service request, the service request cannot be closed until this task is closed.
7. You may use the default values in the Assignee and Owner fields or change them by selecting from the list of values. You can also change these fields by using the Assignment Manager. To access the Assignment Manager, click the Assignment Manager button next to the fields. The Assignment Manager looks up the Calendar, Territory Management and Resource Management modules to assign an appropriate resource for the job based on skill set, availability and assigned territory. For additional information about the Assignment Engine, refer to *Oracle CRM Foundation Concepts and Procedures*.
8. Select the Planned Start and End Dates.
9. Save the task. A system generated task number is displayed in the Num field.
10. To manually launch workflow, click **Launch Workflow**. A message is displayed indicating that workflow was successfully launched.
11. To access the Task Manager, click **Task**.
12. To create notes for this task, click **Notes**.
13. Click **More** to open the Task Details window to enter details such as resource assignments, dependencies, references, and contacts.

    See Entering Task Details for more information.

2.12.2 Creating a Task Using the Task Template

To create a task using the task template:

1. Open the Task tab in the Service Requests window.
2. Click **Use Template** in the Task tab.

3. The Create Tasks from Template Group window opens.

4. In the Template Group field, select the template group based on the task which is to be created. Values in the Source Document, Source Name, Owner Type and Owner fields are defaulted. You may change these values, if needed.
5. Click **Create Tasks**.

2.12.3 Entering Task Details

The Task Details window allows you to enter details such as resource assignments, dependencies, references, and contacts for the current task. To open the Task Details window, click **More** in the Task tab of the Service Requests window.

See Also:

- Defining Resource Requirements
- Setting Task Dependencies
- Linking Tasks to Source Documents
- Setting Recurrence Schedules
- Viewing Task Audit History

2.12.3.1 Defining Resource Requirements

Define resources as the tools and / or personnel needed to complete a task. The task owner assigns and schedules the required resources after choosing the best available options.

To define resource Requirements:

1. Open the Task Detail window by clicking **More** in the Task tab. The Resource tab opens by default.
2. In the Resource Type field, select the resource type needed to solve the customer issue.
3. In the Unit field, enter a numeric value. This value determines the numbered amount of a particular resource, for example, three hours.
4. Select the enabled check box if it is not already checked by default.
5. In the Assignments region, select from the list of values in the Type and Name fields.
6. Select the status of the task in the Status field.
7. If you want to schedule a resource, select the Schedule check box. To complete scheduling:
   a. Enter scheduled distance and duration values, and select a unit of measure.
   b. If you want to update actual schedule information, enter the actual Start and End dates.
   c. You may use the Assignment Manager to select and schedule the resource. To open the Assignment Manager, click the Assignment Manager button.
8. Click **OK** to save your work.

2.12.3.2 Setting Task Dependencies

Task dependencies store the desired order among tasks. Dependencies are not enforced within CRM applications and dependency information is provided for exporting data to third party applications.

Prerequisite

You must create a task before you can set dependencies for it.

To set task dependencies:

1. From the Task Detail window, open the Dependencies tab.
2. Select the dependent task number from the list of values in the Task Number field. The task name is automatically displayed.

3. Enter a numerical value in the Offset field. This value determines the time that separates the action of initial tasks from subsequent tasks. Use this feature to organize tasks with time sensitive restrictions.
4. Select a unit of measure in the UOM field.
5. Click **OK**.

2.12.3.3 Linking Tasks to Source Documentation

Creating references to a source document allows you to reference pertinent background information. Source documentation could be the original service request that resulted in the creation of a task.

To link a task to its reference document:

1. From the Task Detail window, open the References tab.
2. Select from the list of values in the Document Type field.
3. Enter the identification number of the source document in the Number field.
4. Click **OK**.

2.12.3.4 Setting Recurrence Schedules

If the task is to be performed on a regular basis, you may specify a daily, weekly, monthly, or yearly schedule.

To set a recurrence schedule for a task:

1. From the Task Detail window, open the Recurrences tab.
2. Select the frequency for the recurrence of the task by selecting the Daily, Weekly, Monthly, or Yearly button. Your selection determines the fields available in the Recurrences tab.
3. In the Start field, select the date after which the task is to be repeated.
4. Optionally, in the End field, select the date after which the task will not be performed.
5. Set the recurrence schedule.
6. Click **OK**.

2.12.3.5 Viewing Audit History for the Task

The Audit tab of the Task Detail window presents historical information on the changes that have been made to the task.

2.12.4 Task Default Fields

The following fields are defaulted from profile options when creating a task.

- Status - Indicates the current status of the task.
- Type - Categorizes the task and is used to define criteria for reporting on tasks.
- Priority - Indicates the relative priority of the task.
- Owner - Indicates the person who is responsible for monitoring the progress of the task.
- Owner Type - Shows the resource category of the Task Owner and the choices are Employee, Group or Team Resources.
- Assignee - Indicates the person who is assigned to do the work described in the task.
- Assignee Type - Shows the resource category of the Task Assignee and the choices are Employee, Group or Team Resources.
- Private and Publish Flags - If the Publish Flag is set then all support agents can view the task. If the Private Flag is set, then only the task owners can view the task.

2.13 Viewing Customer Interactions and Activities

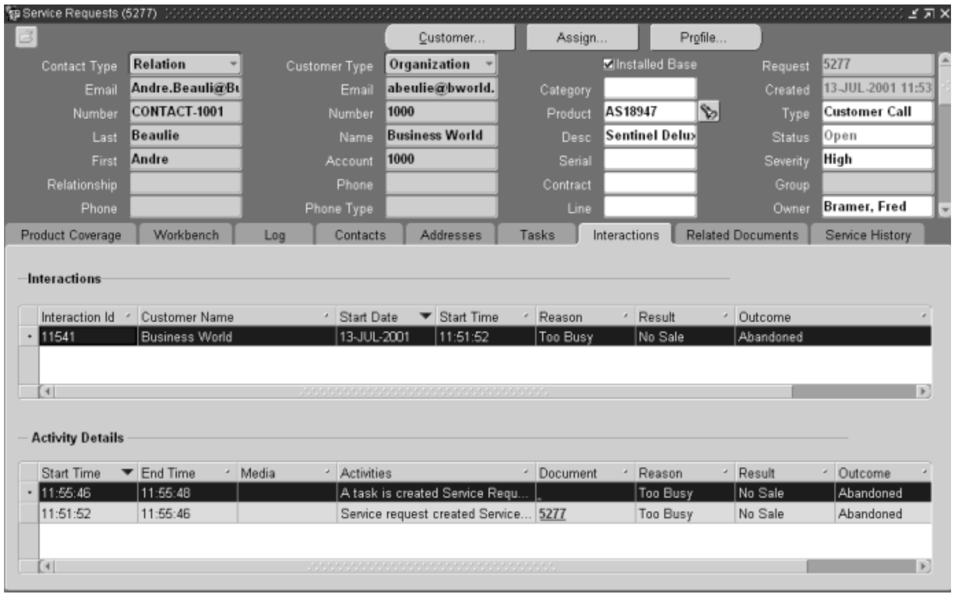
The Interactions tab of the service request displays the entire history for the service request. For example, you can view all closed interactions for a service request in this tab. Closed interactions occur when a support agent uses the End Interaction button after the interaction is complete.

An interaction can have multiple activities associated with it. For example, an incoming call is an interaction and its associated activities could be a service request and some tasks.

To record and view customer contact interactions:

1. Navigate to the Service Requests window and create a service request or query an existing service request.

2. Open the Interactions tab. The Interaction tab displays the various interactions that your organization had in the past with this customer.



3. A profile option defines the number of interactions that is displayed. To see all interactions, click **All Interactions**.

4. You can drill down to view activities to which the Interaction is associated by double clicking on the number of the related activity.

2.14 Linking Related Documents to a Service Request

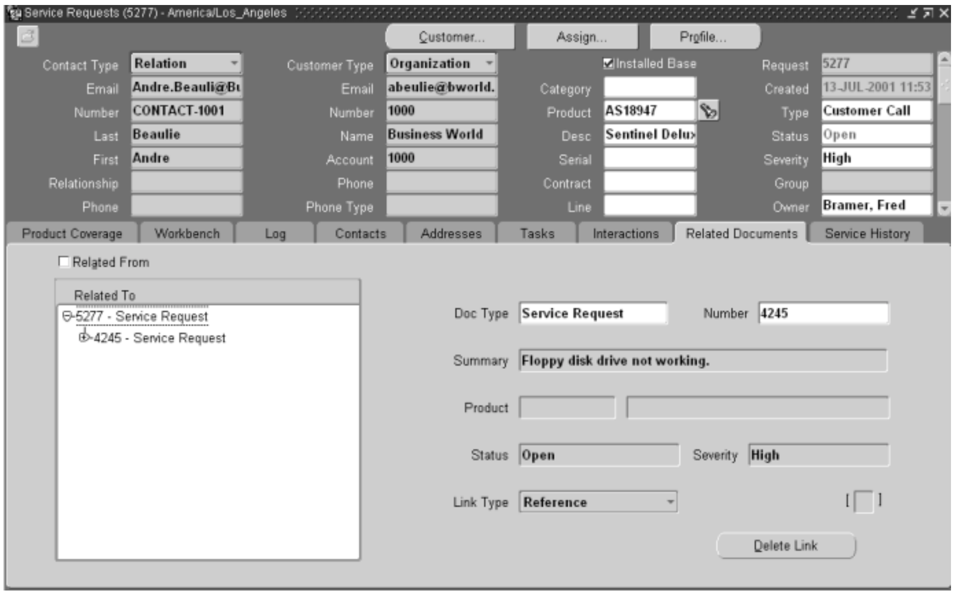
You can link a document to one or more service requests. For example, if several customers report the same problem occurring in a product, you can link these service requests together, or link each of these service requests to the service request that contains a thorough description of the problem resolution.

A service request can also be linked to a defect. When a defect is created from a service request, it automatically creates a link between the defect and the service request.

When a service request is created by using the copy command from a service request, you can, optionally, create a link between these two service requests.

To link related documents to a service request:

1. Navigate to the Service Requests window and open a service request.
2. Open the Related Documents tab.



3. The Related To tree appears on the left side of the Related Documents window. You can expand a node on the tree by clicking the + sign. The details of the document selected on the tree are displayed in the fields on the right side of the window.
4. In the Related Documents tab, select a document type of Service Request and the document number to be related to this service request. The Summary, Product, Status, and Severity fields for the selected document are displayed.
5. Select a link type from the Link Type field. The choices are Reference and Duplicate.
6. Save your work to link the selected document to your service request.
7. You can delete a link by selecting a document on the tree structure and clicking on the Delete Link button.

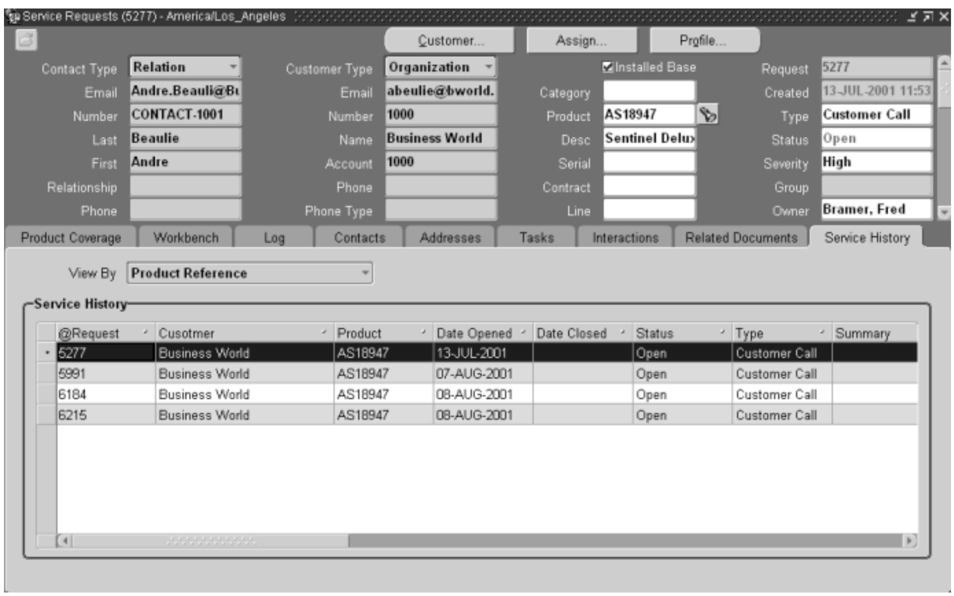
8. By clicking on the Related From check box, the service requests which linked this service request to them are displayed.

2.15 Viewing Service History

The Service History tab provides a view of the service requests that have been created for a product or for a product and customer combination. The list of service requests in this tab is based on the product and customer that is entered in the header region of the service request.

To view service history:

1. Navigate to the Service Requests window and create a service request or query an existing service request.
2. Open the Service History tab.



3. Select one of the following choices in the View By drop down list:
   - Product Reference - Displays a list of service requests for all customers for the Install Base product specified in the header region.

- Component Reference - Displays a list of service requests for all customers for the Install Base component specified in the header region.
- Sub-Component Reference - Displays a list of service requests for all customers for the Install Base sub-component specified in the header region.
- Product Item - Displays a list of service requests for the Install Base or inventory item associated with the product specified in the header region. This list is restricted to the customer specified in the header region.
- Component Item - Displays a list of service requests for the Install Base or inventory item associated with the component specified in the header region. This list is restricted to the customer specified in the header region.
- Sub-Component Item - Displays a list of service requests for the Install Base or inventory item associated with the sub-component specified in the header region. This list is restricted to the customer specified in the header region.

2.16 Printing a Service Request

Service requests can be printed from three places. In the Service Request Log tab and the Workbench tab, the button called Print Friendly Format can be used to print a service request. You can also select the Print Request option in the Tools menu regardless of which Service Request tab you are using.

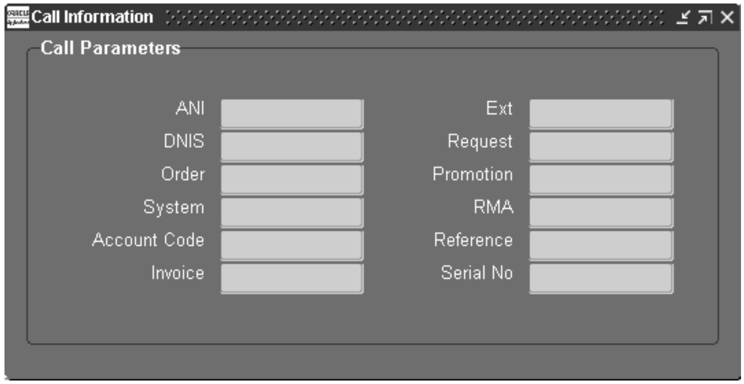
After initiating the printing function, a browser page opens. You can then select which Note Status(es) you want to include in the report.

2.17 Wrapping Up a Call

The following buttons are visible at all times from the Contact Center window regardless of the tab you are using. To wrap up a call, you can use the Call Wrap Up or End Interaction buttons, depending on the situation.

Call Information:

Use this button to open the Call Information window where you can view call (IVR) parameters such as ANI, DNIS, Order, System, Account Code, and Service Request Number which the customer enters while calling for customer support.



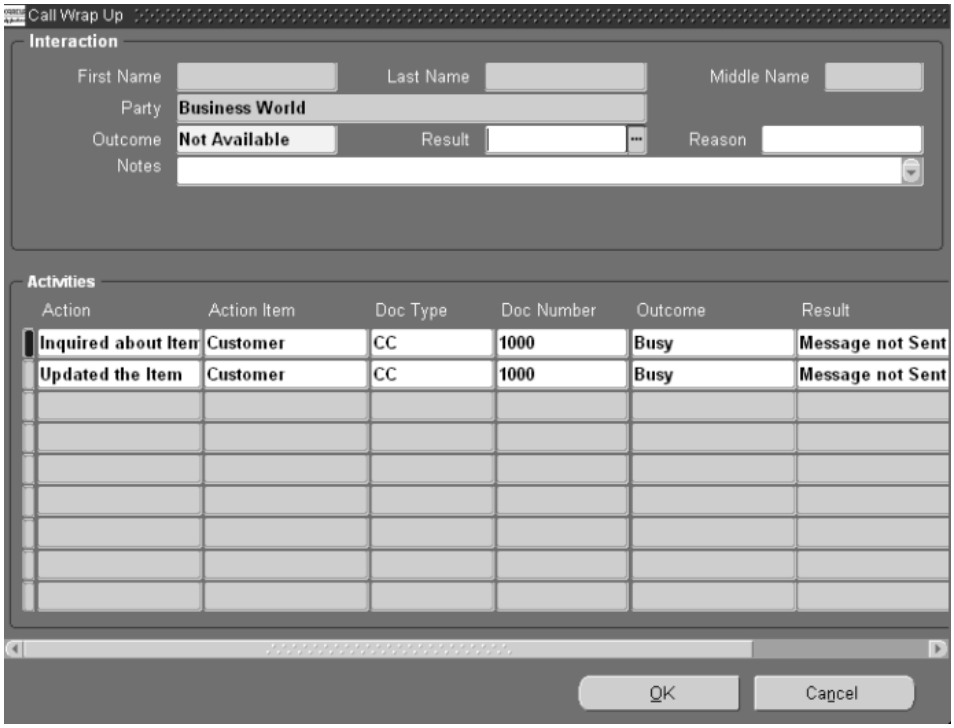
Call Wrap Up:

Use this button to open the Call Wrap Up window where you can enter additional information about the interaction with the customer. A default value is provided for outcome, result, and reason, which you can override if required. You can optionally enter additional information about the call in the Notes field, which is a new field in 11.5.6.

Each customer interaction results in two activities, which are displayed by default when you open the Call Wrap Up window. The first activity is the result of querying the customer. The second activity is the result of saving everything that was updated during the customer interaction.

If you want to create additional activities, click the Add New Record icon in the toolbar. Enter the details in the Outcome, Result and Reason fields and then save your work. The values in these field are defaulted from profile options and you can override them if needed.

The interaction is ended when you click OK. The Call Wrap and End Interaction buttons are then disabled. Pressing Call Wrap Up to end the present interaction signals that you are ready to accept new calls.



End Interaction:

Use this button to terminate the customer interaction if there is no wrap up to be done for the call. If you click **End Interaction**, the Call Wrap Up and End Interaction buttons are disabled. Pressing End Interaction to end the present interaction signals that you are ready to accept new calls.

Agent On Break:

Use this button to signal that you are on a break and are not available to accept calls. The button label then changes to Agent Off Break. When you are ready to accept new calls, click **Agent Off Break** to signal that you are back from the break. If you plan to take a break, you must click **Agent on Break** before you click **End Interaction**, because clicking **End Interaction** allows new calls to reach you.

2.18 Contributing to the Knowledge Base

The integration of the Service Requests window with the Knowledge Management System allows you to contribute new solutions to the knowledge base.

Prerequisites

Knowledge Management must be properly setup for this feature to work properly.

To contribute to knowledge base:

1. In the Service Requests window, create a service request, or query an existing service request.
2. Click the Search Knowledge Base button in the Workbench tab to open the Knowledge Base Search window.

Refer to *Oracle iSupport Concepts and Procedures* for details on how to contribute to the Knowledge Base.

2.19 Closing a Service Request

When you resolve a service request, you can take the following actions:

- Enter a Resolution Code to categorize how the issue was resolved
- Create a note to describe how the issue was resolved
- Contribute to the knowledge base
- Bill the customer for charges incurred
- Update the status of the service request

Using Resolution Codes

Resolution codes can be used to categorize how service requests are resolved. If your organization uses resolution codes, you can select a resolution code in the Resolution Code list of values in the Service Request Workbench tab.

Creating a note to describe how the issue was resolved

When a service request is resolved, you can document in the service request how the issue was resolved. To do this, follow the steps described in Creating and Viewing Notes.

Contributing to the knowledge base

If your service request was resolved using a solution that was not in the knowledge base, you can contribute your new solution to the knowledge base. To do this, follow the steps described in Contributing to the Knowledge Base.

Billing customers for charges incurred

If you need to bill the customer for charges incurred during the resolution of the service request, refer to the steps described in Billing for Charges from Service Requests.

Updating the status to close a service request

When the issue in a service request is resolved, you must record this by updating the status of the service request.

1. Navigate to the Service Requests window.
2. Find the service request to be closed.
3. Open the Workbench tab.
4. Update the Status field to a value that represents a closed service request.
5. Save your work.

2.20 Service Request Workflows

When you create a service request for your customer's issue, you can use the technology of Oracle Workflow to drive the service request resolution process. Workflow routes information to related parties inside and outside your enterprise according to your business rules. The Service Request Workflow consists of processes that you can view graphically in Oracle Workflow. Each process comprises activities that together represent the flow of information required to achieve service request resolution. Using Oracle Workflow you can create additional activities to enhance and customize your workflow process. You can also use Oracle Workflow to create your own custom workflow processes for each service request type.

The Service Request Workflow is initiated when you enter a new service request and you assign an employee to the request. The Call Support process within this workflow automatically routes the new service request to the individual for resolution, alerts the supervisor as needed when the current owner does not respond to the request and allows the current owner to escalate or transfer the request to the next level of support.

2.20.1 Service Request Workflow Attributes

The Service Request Workflow has the following attributes associated with it. These attributes reference information in the Service Request data model and are used and maintained by activities throughout the workflow process.

Service Request Workflow Attributes

Display	Description	Type	Format/Length
Initiator Role	Workflow role name of process initiator	Text	100
User ID	Initiator’s application user identifier	Number	
Resp ID	Initiator’s responsibility identifier	Number	
Resp Appl ID	Initiator’s application identifier	Number	
Workflow Administrator Role	Workflow role name of Oracle Service workflow administrator	Text	100
Request ID	Internal identifier of the service request	Number	
Request Number	User-visible service request number	Text	64
Request Date	Service request date	Date	DD-MON-YYYY HH24:MI:SS
Request Type	Service request type	Text	30
Escalation History	Escalation history	Text	2000
Escalation Comment	Optional escalation comment provided by owner	Text	2000
Last Escalation Comment	Last escalation comment	Text	2000
Request Status	Service request status	Text	30
Request Severity	Service request severity	Text	30
Request Urgency	Service request urgency	Text	30
Owner ID	Employee ID of current owner	Number	
Owner Name	Name of current service request owner	Text	240

Service Request Workflow Attributes

Display	Description	Type	Format/Length
Owner Role	Workflow role name of current service request owner	Text	100
Request Summary	Service request summary	Text	80
Request Customer	Customer who made the request	Text	50
Inventory Item ID	Inventory item ID from item master	Number	
Product Description	Product description	Text	240
Customer Product ID	Customer product ID from installed base	Number	
Problem Description	Problem description	Text	2000
Expected Resolution date	Expected resolution date of the service request	Date	DD-MON-YYYY
Response Deadline	Deadline by which owner must respond to notification	Date	DD-MON-YYYY HH24:MI:SS
Supervisor ID	Employee ID of current owner's supervisor	Number	
Supervisor Name	Name of current owner's supervisor	Text	240
Supervisor Role	Workflow role name of current owner's supervisor	Text	100
Previous Owner ID	Employee ID of previous owner	Number	
Previous Owner Name	Name of previous owner	Text	240
Previous Owner Role	Workflow role name of previous owner	Text	100

2.20.2 Seeded 'Call Support' Workflow Process

When the Call Support process begins, it identifies information about the service request, such as the service request number and owner. The process then sets a response date that serves as a deadline by which the owner must respond, and sends an assignment notification to the owner. If the owner does not respond before the response deadline, the process sends a notification to alert the owner's supervisor, sets a new response deadline and re-sends the assignment notification to the owner. This continues until the owner takes action. If the owner resolves the request and responds to the assignment notification with the Resolved result, then the process closes the request and ends with a result of Resolved. However, if the owner is unable to resolve the request and responds to the assignment notification with the Escalate result, then the Escalation subprocess looks up the supervisor of the current owner and reassigns the request to the supervisor. It then sets a new response date for the new owner and sends an escalation notification to that individual. This subprocess continues until the owner resolves the request.

In Oracle Workflow, the Call Support process consists of the following subprocesses and activities:

- Notify Owner
- Escalate Notification
- Alert Supervisor

Descriptions of the activities that comprise the Call Support Workflow Process follow.

Initial Request Activity

This activity initializes the workflow attributes that remain constant over the duration of the workflow process.

Initialize Escalation History Activity

This activity initializes the Escalation History. It records the date and time of the first owner assignment in the workflow process.

Get Request Attributes Activity

This activity initializes or updates the workflow attributes with the most current values in the database.

Set Response Deadline Activity

This activity sets the date by which the service request owner must respond to the notification.

Notify Owner with Expiration Process

This subprocess initiates when a new service request is logged or when the service request owner fails to respond before the assignment notification times out. For a description of the activities included in this process, see Notify Owner with Expiration Subprocess.

Escalation Process

This subprocess initiates when the owner is unable to resolve the service request and chooses to escalate the service request to the next level of support. For a description of the activities included in this process, see Escalation Subprocess.

Alert Supervisor Process

This subprocess initiates when the service request owner fails to respond before the assignment or escalation notification times out. For a description of the activities included in this process, see Alert Supervisor Subprocess.

Close Request Activity

This activity closed the service request by setting the status to Closed.

End (Resolved) Activity

This activity marks the end of the Call Support process. The process has a result of *Resolved.*

2.20.3 Notify Owner Subprocess

This subprocess initiates when a new service request is logged or when the service request owner fails to respond before the assignment notification times out. This subprocess consists of the following activities.

Start Activity

This is a standard activity that marks the start of the subprocess.

Is Response Deadline Valid Activity

This activity verifies whether the response deadline is valid.

Wait for Owner Response Activity

This is a standard activity that waits until the time specified by the Set Response Deadline activity.

Notify Owner With Expiration Activity

This activity notifies the service request owner that a new service request is assigned to him or her, with the note that he or she must respond to this notification before the specified deadline. Otherwise, the supervisor will be alerted.

Notify Owner Activity

This activity notifies the service request owner that a new service request is assigned to him or her. The only difference between this and the Notify Owner With Expiration activity is that this activity does not have a response deadline.

End (Expired, Escalate, Resolved) Activities

These activities mark the end of the subprocess with the result of *Expired, Escalate or Resolved*.

2.20.4 Escalate Notification Subprocess

The Escalation subprocess initiates when the owner is unable to resolve the service request and chooses to escalate the service request to the next level of support. In Oracle Workflow, the Escalation subprocess consists of the following subprocesses and activities.

Start Activity

This is a standard activity that marks the start of the subprocess.

Select Supervisor Activity

This activity looks for the supervisor of the current service request owner.

Escalate to Supervisor Activity

This activity reassigns the service request to the supervisor of the employee who escalated the service request.

Update Escalation History Activity

This activity updates the Escalation History. It records the date and time of the new owner assignment and the escalation comment of the last owner who escalated the request in the workflow process.

Get Request Attributes Activity

This activity updates the workflow attributes with the most current values in the database.

Set Response Deadline Activity

This activity sets the deadline by which the service request owner must respond to the notification.

Notify Escalation With Expiration Process

This subprocess consists of the same activities as the Notify Owner With Expiration subprocess in the Call Support process, except that it sends escalation notifications rather than assignment notifications to the new owner of the escalated service request.

Alert Supervisor Process

This subprocess is described below.

End Activity

This activity marks the end of the subprocess.

2.20.5 Alert Supervisor Subprocess

The Alert Supervisor subprocess initiates when the service request owner fails to respond before the assignment or escalation notification times out. The Alert Supervisor subprocess consists of the following activities.

Start Activity

This is a standard activity that marks the start of the subprocess.

Select Supervisor Activity

This activity looks for the supervisor of the current service request owner.

Alert Supervisor Activity

This activity notifies the supervisor that the service request owner has failed to take action before the response deadline.

End Activity

This activity marks the end of the subprocess.

3

Using the Service Requests Tools Menu

This section explains how to use the options in the Tools menu to perform essential business tasks.

The following topics are covered:

- Entering Quality Results
- Sending a Copy of the Service Request Using Fulfillment
- Printing a Service Request
- Copying a Service Request
- Managing Workflows
- Viewing Service Request Audit History
- Creating a Defect from a Service Request
- Creating an Enhancement from a Service Request
- Managing Messages in Service Requests
- Recording Counter Readings
- Billing for Charges from Service Requests
- Escalating a Service Request
- Escalating a Service Request Task
- Navigating Using Quick Menu

Tools Menu options are enabled only when the particular function would logically be allowed. For example, the Escalate Service Request option is enabled only after you have created a service request.

3.1 Entering Quality Results

From a service request, you can directly enter results into a Quality Plan to collect quality information configured in the Quality Plan.

Prerequisite

You must define a quality plan.

To enter quality results:

1. Navigate to the Service Requests window.
2. Create a service request or query an existing service request.
3. From the Tools menu, select Enter Quality Results option.

For additional information on Quality Plans, refer to *Oracle Quality User's Guide*.

3.2 Sending a Copy of the Service Request Using Fulfillment

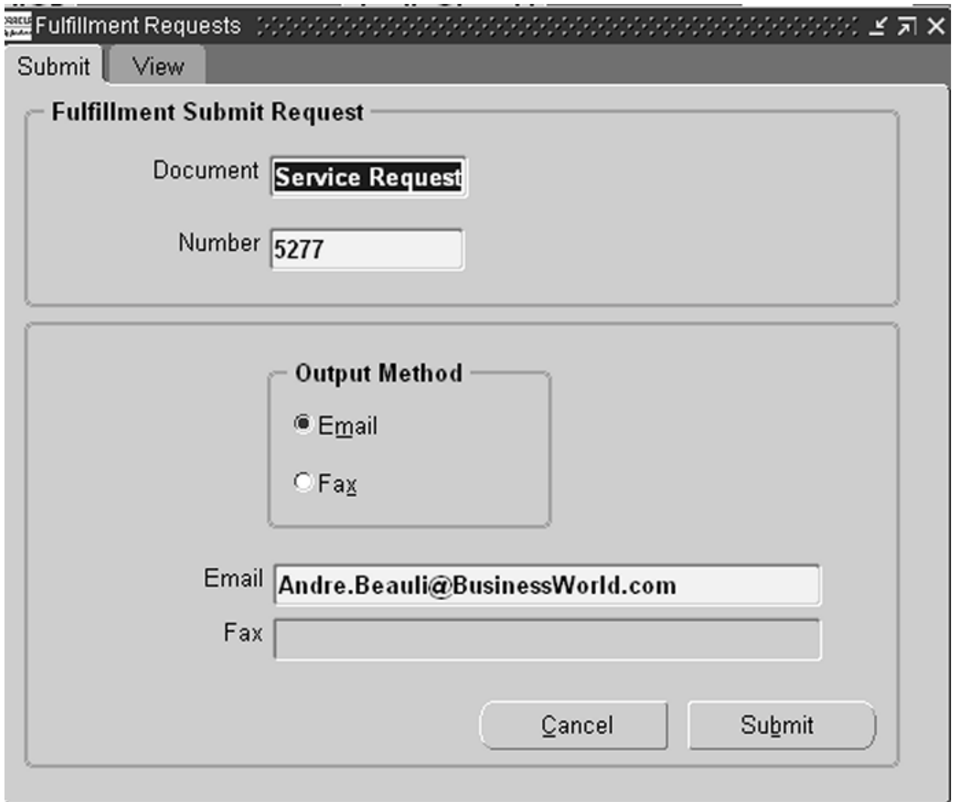
From within a service request you can send a copy of the service request by email or fax using the integration with Fulfillment.

Prerequisite

You must set up Oracle 1-to-1 Fulfillment.

To send a copy of the service request using fulfillment:

1. Navigate to the Service Requests window.
2. Create a service request or query an existing service request.
3. From the Tools menu, select the Fulfillment Request option. The Fulfillment Requests window opens.



4. From this window, you can select to Email or Fax the fulfillment request.
5. Enter the email address or fax number.
6. Click **Submit** to send the service request to the fulfillment server.
7. You can open the View tab to see the status of your submission.

3.3 Printing a Service Request

You can print a service request from the Tools menu or from the Print Friendly Format button in the Log tab or the Workbench tab of the Service Requests window.

You can control which note statuses are displayed in the service request printout.

To print a service request:

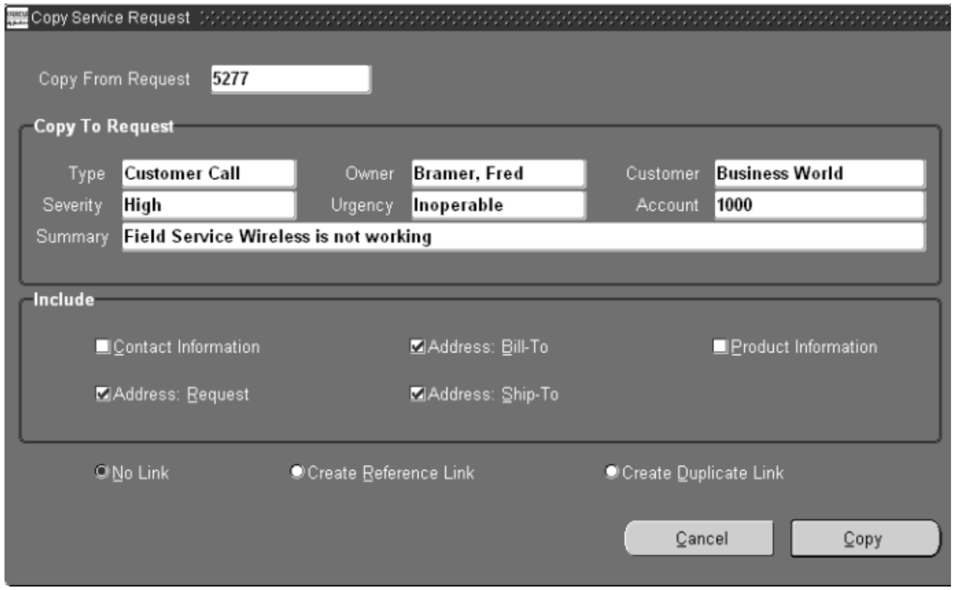
1. Navigate to the Service Requests window.
2. Create a service request or query an existing service request.
3. From the second Tools menu, select Print Request.
4. A browser page opens.
5. Select the Note Status(es) that you want to include in the report.
6. Print the service request using your normal browser print functions.

3.4 Copying a Service Request

You can create a new service request by using the Copy Service Request function to copy the information from an existing service request.

To duplicate a request:

1. Navigate to the Service Requests window.
2. Open a service request or create a new service request.
3. From the Tools menu, select Copy Request. The Copy Service Request window opens.



4. Change any of the defaulted Copy To Request information such as Type, Severity, Owner, Urgency, Customer, Account, Summary. This information is used to create a new service request.
5. Select the desired Include check boxes to copy additional information into the new service request.
6. Select one of the following Reference link options; No Link, Create Reference Link, Create Duplicate Link. If you check Create Reference Link or Duplicate Link, a Reference link is established, in the new service request only, to the service request used to create the copy. This Reference link is available in the Service Request Reference tab.
7. Click **Copy**. The new service request is created and you are presented with that service request to enable updates.

3.5 Managing Workflows

Oracle Support uses Oracle Workflow to implement procedures to automatically notify service personnel about their assignments. From within service requests you can directly launch and abort workflows. When you launch workflow for a service request or a task, a notification is sent to the owner of the service request or task. The owner can respond to the notification.

Each service request type can be associated with a pre-configured workflow. When the service request is created, the workflow associated with the service request type can be configured to start automatically. You can configure an option to abort the workflow automatically when the service request is closed. No automatic workflow processing is done if the service request type is changed.

The Service Request module provides the Active Workflow check box to indicate if an active workflow is in progress. This check box is located near the bottom of the service request header. To view the name of the workflow, run a query from the Define Service Request Type window, using the service request type with which the workflow is associated as the query criterion.

Prerequisite

You must configure request types to use Oracle Workflow business processes before you can launch a workflow from a service request.

3.5.1 Manually Using Service Request Workflows

You can manually launch or abort a workflow from within a service request.

To launch a workflow:

1. Navigate to the Service Requests window.
2. Create a service request or query an existing service request.
3. From Tools menu, select the Launch Workflow option.
4. Select Yes to start the workflow

To abort a workflow:

1. Navigate to the Service Requests window.
2. Open a service request or create a new service request.
3. Verify that the Active Workflow check box, in the service request header area, is checked. Note that you may need to scroll down to view this field.
4. From the Tools menu, select the Abort Workflow option.
5. Select Yes to stop the workflow.

3.5.2 Using Service Request Task Workflows

After creating or updating a task, you need to notify the task assignees of their involvement. Workflow emails the task owner and assignee whenever a task is created or updated.

Prerequisite

You must associate a workflow process to the task type being used.

To enable a workflow for a task:

1. Open the Task tab from the Service Request window.
2. Create or query an existing task.
3. Click **More** to open the Task Details window.
4. Click **Launch Workflow**.
5. Save the task.

3.6 Viewing Service Request Audit History

You can view the audit history tracked for changes made to a service request. The fields audited in the service request are:

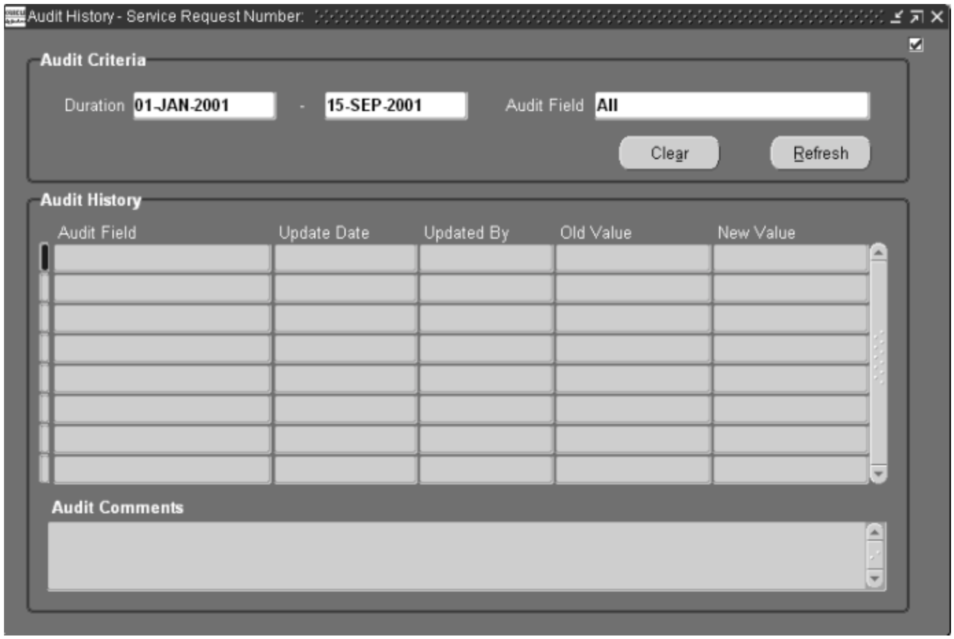
- Owner
- Type
- Urgency
- Severity

As you change information about service requests and tasks, the service request maintains an audit history of the changes. For each audit record, information such as the user name of the person who made the change, date and time when the change was made, and the value both before and after the change are recorded. For example, if you change the status of a service request from Open: Unassigned to Open: Assigned, the service request records the old and new status values, as well as the user who made the change and the date of the change.

To view service request audit history:

1. Navigate to the Service Requests window.

2. Query an existing service request.
3. From the Tools menu, select Audit History. The Audit History window opens.



4. Enter the duration dates for the audit history information.
5. Select the service request field you want to audit from the list of values in the Audit field.
6. Review the audit history.

3.7 Creating a Defect from Service Requests

From within service requests you can directly create a defect in the Oracle Quality Online application. Defects are issues relating to inventory items. Once the problem reported in the service request has been determined to be a product defect, use this procedure to create a defect from service requests.

Prerequisite

The Oracle Quality Online application must be properly configured and setup. See the *Oracle Quality Online Implementation Guide* for more information.

To create a defect from service requests:

1. Navigate to the Service Requests window.
2. Create a service request or query an existing service request.
3. From the Tools menu, select Create Defects.
4. The Create Defects HTML page opens from Oracle Quality Online. Your service request number defaults into the Service Request field.
5. Click Auto Fill to populate the defect create fields. Verify that the Auto Fill information is correct for this defect. Note that the Summary field on Page 2 displays the summary from the Service Request. You may delete this summary and create a new summary, if desired.
6. Complete any remaining Product/Platform fields wherever possible. Although only certain fields may be required based on your setup, your entries in the other fields affect how the defect is handled and assigned, and how it will be used for reporting on product quality.

   Refer to *Oracle Quality Online Concepts and Procedures* for additional information about entering defects.
7. Click **Continue** after entering all values. The Create Defect page Step 2 of 2 appears.
8. Click **Close** to return to the service request.

3.8 Creating an Enhancement from Service Requests

From within service requests you can directly create an Enhancement Request. Enhancements are improvements to existing inventory items.

Enhancements and defects are both tracked and managed in Oracle Quality Online. Follow the procedure identified in Creating a Defect from Service Requests. When creating an enhancement, select Enhancement Category from the list of values.

Refer to *Oracle Quality Online Concepts and Procedures* for additional information about entering enhancements.

3.9 Managing Messages in Service Request

Messages can be sent and viewed from the service request. The Messages feature leverages Oracle Workflow to send and view messages. For example, you can send a message for a specific service request from the Service Requests window that contains a request for action. In this case, a response is required of the message's recipient to indicate whether the action is accepted, rejected, or completed. In addition, you can choose to have a confirmation sent to you once the recipient has responded to your message.

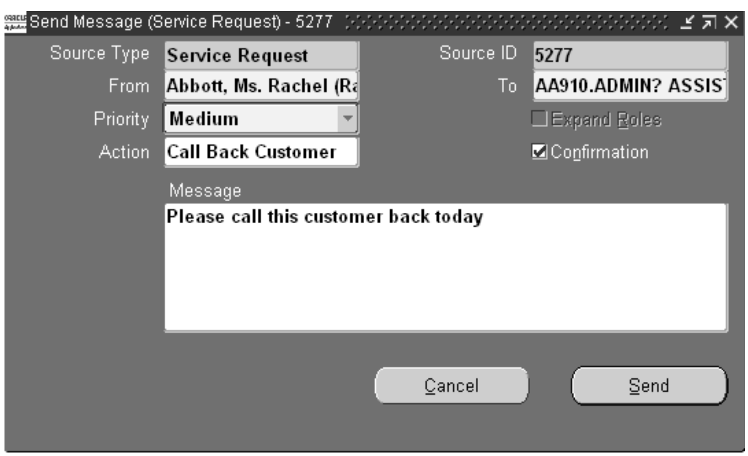
3.9.1 Sending Messages

Prerequisite

Oracle Workflow must be configured before you can send messages.

To send messages:

1. Navigate to the Service Requests window.
2. Create a service request or query an existing service request.
3. From the Tools menu, select Send Message. The Send Message window opens.



4. Enter the sender's name in the From field.

   You can enter any value, or use the list of values to select from all roles defined for use with Oracle Workflow. The default value is the Workflow display name of the current user; if the user's Workflow role cannot be determined, the FND user name defaults.

5. Select a Priority from the list of values.Three priorities are provided with the Message feature (High, Medium, Low) and Medium is the default value. These Priorities are not user definable and are not related to Oracle Workflow notification priorities.
6. Select an Action from the list of values.

   For more information, see Defining Action Requests in the Oracle Support Implementation Guide.
7. Enter the recipient's name in the To field. Note that the recipient's name must be defined in Oracle Workflow roles.
8. Check Expand Roles if you plan to send this message to a Workflow role that includes several individuals and if you want each person to receive a copy of the message.
   - By default (if this box is not checked), one message is sent to the role as a whole. If one individual responds to or closes the message, the message is removed from the inbox of all other individuals in that role.
   - If you check Confirmation, you will not be able to check Expand Roles.
   - If you entered an Action, you will not be able to check Expand Roles. The reason for disabling the Expand Roles function is because you may not want all of the recipients to perform the same action.
9. Optionally, check Confirmation if you want to receive a confirmation message once the recipient has responded to your message.
   - If you check Confirmation, the From field is validated to ensure that the sender is a valid Workflow role.
   - If you check Expand Roles, you will not be able to check Confirmation.
10. Enter your message text.
11. Click Send to pass the message to Oracle Workflow for delivery and processing.

3.9.2 Viewing and Responding to Messages

These messages will also appear in the Universal Work Queue along with other Oracle Workflow notifications. They may also appear in your email application, a Web page or Oracle Workflow Notification Summary window, based upon your Oracle Workflow configuration.

To view and respond to messages:

1. Navigate to the Universal Work Queue.
2. Select a message and open it by double clicking on the message. The Notifications window appears.
3. Select Respond and choose your response from the Result list.

   If the message does not include an action request, you must respond with Acknowledge. Otherwise, choose one of the following responses:

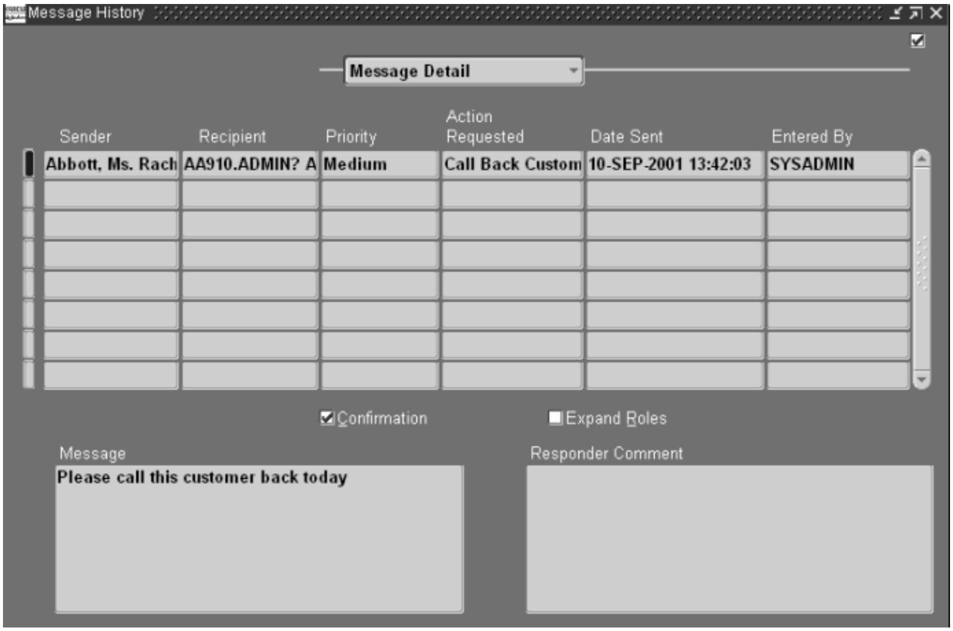
   - *Accept* if you accept the responsibility of performing the requested action.
   - *Reject* if you reject the responsibility of performing the requested action.
   - *Done* if you have completed the action.
4. Optionally enter additional comments, such as your reason for rejecting the request.
5. Select OK. A confirmation message will be sent to the original message's sender if and only if the sender checked Confirmation.

3.9.3 Viewing Message History

To view message history for a service request:

1. Navigate to the Service Request window.
2. Open a service request.
3. From the Tools menu, select View Message.

The Message History window appears, displaying sender, recipient, and response information for all messages that were sent concerning the service request.



3.10 Recording Counter Readings

From within service requests you can update any Counters associated with a specified product, installed base item or product. An example of a usage for counters is a service contract for a copy machine where the contract charges depend on the number of copies that have been generated.

Prerequisite

A service request for a product or installed base that has a counter defined and instantiated must be available. See the *Oracle Service Implementation Guide* for more information.

To record counter readings from service requests:

1. Navigate to the Service Requests window.
2. Create a service request or query an existing service request.
3. From the Tools menu, select Counter Capture. The Counter Capture window opens.

4. Enter the New counter value, miscellaneous reading information or reset the counter.
5. Click **Save**.

3.11 Billing for Charges from Service Requests

Using the charges capability, a service organization can bill customers for services provided for services, repairs and returns.

To bill for charges:

1. Navigate to the Service Requests window.
2. Create a service request or query an existing service request.
3. Open the Charges window by selecting the Charges option from the Tools menu.

   Request details such as Type, Status, Severity, and Date come from the parent service request. The Bill To and Ship To addresses default from the service request. These addresses can be changed.

Refer to *Oracle Service Concepts and Procedures* for additional information about entering charges.

3.12 Escalating a Service Request

Using the escalation functionality, you can create an escalation document for critical situations involving one or more service requests. The escalation document raises awareness and enables swift action to manage and resolve the situation. The escalation document is assigned to an owner, and tracks the business situation information, requester, additional contacts, and all actions taken toward resolving the situation. The escalation document can also identify or escalate related service requests, defects and tasks as required.

The current escalation level of a service request is displayed in the Escalation Level field on the Service Request window. Escalation levels represent the degree of visibility. The default value of Not Escalated is associated with all service requests that have not been escalated.

You must scroll down on the header region of this window to view this field.

A system profile option is available for setting the color of the service request number when the service request is escalated. See the *Oracle Support Implementation Guide* for more information on using this profile option.

Notifications are an integral part of the escalation functionality. Oracle Workflow is used to process and deliver the notifications regarding escalation activity. Notifications are sent for the following reasons:

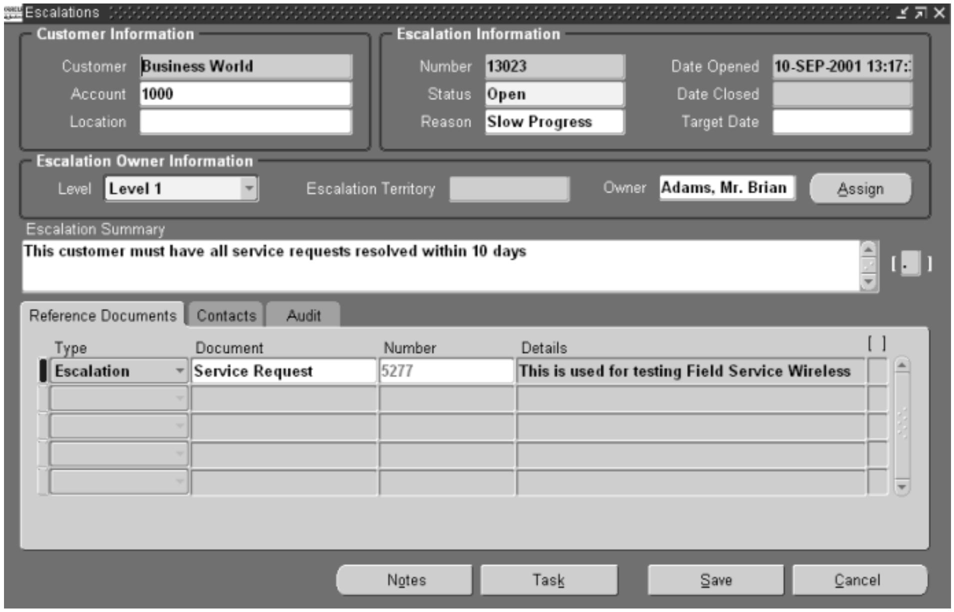
- Escalation creation
- Escalation status changes
- Escalation owner assignment and changes
- Escalation level changes

Notifications can be sent to a variety of recipients, depending on the system profile options set. Typical recipients include:

- Owner of the service request
- HR manager of the service request owner
- Escalation Territory member or the Primary Contact

To escalate a service request:

1. Navigate to the Service Requests window
2. Create a service request or query an existing service request.
3. From the Tools menu, select Request Escalation. The Escalations window opens.



4. The customer and service request information defaults.
5. Select a status code that fits the status of the escalation.
6. Select a reason code that describes the reason for the escalation.
7. Date Opened is automatically populated when the window is opened.
8. Date Closed is automatically populated when the escalation is closed.
9. Optionally enter a Target Date for closing the escalation.
10. Select the Escalation Level from the list of values.
11. The Escalation Owner is the party responsible for managing the escalation. Assign the escalation to a resource using one of these two methods:
    - Select a resource from the list of values.
    - Click **Assign** to select an escalation owner using the Assignment Manager. Click **Search**. Select a resource by double-clicking on the resource name and then click **OK**.
12. Enter a situation summary in the Escalation Summary field.

13. In the Contacts tab, enter the customer or employee contact who is requesting the escalation and check the Requester box.
14. Optionally enter additional contact points.
15. Optionally add more reference documents to the escalation.
16. Optionally click **Notes** to create a note about the escalation.
17. Optionally click **Tasks** to create a task related to managing the escalation
18. Click **Save** to assign an escalation number. Notifications are sent based upon the escalation management setup and system profile options.

    For additional information regarding Escalation Management, see the *Oracle CRM Foundation Concepts and Procedures*.

3.13 Escalating a Service Request Task

Using the escalation functionality you can create an escalation document for critical situations involving one or more tasks in a service request. The escalation document raises awareness and enables swift action to manage and resolve the situation. The escalation document is assigned to an owner, tracks the business situation information, requester, additional contacts, and all actions taken toward resolving the situation. The escalation document can also identify or escalate related service requests, defects and tasks, as required.

To escalate a service request task:

1. Navigate to the Service Requests window
2. Create a service request or query an existing service request.
3. Open the Task tab.
4. Select the task to escalate.
5. From the Tools menu, select Task Escalation. The Escalations window opens.
6. The customer and service request information defaults.
7. Select a status code that fits the status of the escalation.
8. Select a reason code that describes the reason for the escalation.
9. Date Opened is automatically populated when the window is opened.
10. Date Closed is automatically populated when the escalation is closed.

11. Optionally enter a Target Date for closing the escalation.
12. Select the Escalation Level from the list of values.
13. The Escalation Owner is the party responsible for managing the escalation. Assign the escalation to a resource using one of these two methods:
14. Select a resource from the list of values.
15. Click **Assign** to choose an escalation owner using the Assignment Manager. Click **Search**. Select a resource by double-clicking on the resource name and then click **OK**.
16. Enter a situation summary in the Escalation Summary field.
17. In the Contacts tab, enter the customer or employee contact who is requesting the escalation and check the Requester box.
18. Optionally enter additional contact points.
19. Optionally add more reference documents to the escalation.
20. Optionally click **Notes** to create a note about the escalation.
21. Optionally click **Tasks** to create additional tasks related to managing the escalation

3.14 Navigating Using Quick Menu

The Quick Menu enables you to easily navigate to other windows because the search criteria from the Service Request is automatically used when the new form is opened. For example, to view or update information about your customer's products from an existing service request, select View Customer Products from the Quick Menu. The Product Summary and Details window opens defaulting in your product information from your service request.

Quick menu helps you store search criteria in windows from which the search functionality is available. Using quick menu, you can store frequently used criteria and open up windows more quickly than by manually entering the search criteria and then searching for records.

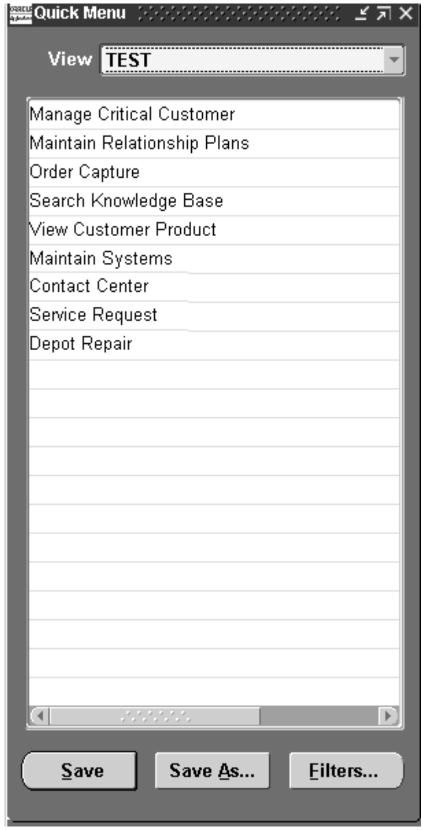
For Quick Menu to function properly, save your folder the first time you access the Quick Menu. Click **Save As** and enter the appropriate folder name and save your changes. After you save your folder, select your folder name the next time you use Quick Menu. To navigate to one of the functions, double-click on the function name.

If you do not need to use some of the form functions available from the quick menu, you can remove it from the Quick Menu menu at the responsibility level. See *Oracle Customer Care Implementation Guide* for more information.

You can add additional form functions to the Quick Menu, even though the form function is not quick menu enabled. This allows you to quickly navigate to the form, but the variables in the original form are not passed to the form on the quick menu. Only quick menu enabled forms can accept variables from the original form.

To access the quick menu:

1. Navigate to the Service Requests window.
2. Create a new service request or query an existing service request.
3. From the Tools menu, select Quick Menu, The Quick Menu window opens.



4. Double-click the desired menu option. A new window opens and defaults in specific information from your service request. The menu options available from the Quick Menu are:

   - Manage Critical Customer
   - Maintain Relationship Plans
   - Create Fulfillment Request]
   - Order Capture
   - Search Knowledge Base
   - View Customer Product

- Maintain Systems
- Contact Center
- Service Request
- Depot Repair