Oracle® Quality Online

Implementation Guide

Release 11*i*

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Oracle Quality Online Implementation Guide, Release 11*i*

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Oracle Quality Online Implementation Guide, Release 11*i*

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Preface

This manual describes the implementation and administration of Oracle Quality Online software 11*i*.

Topics include:

- Intended Audience
- Related Documentation and Training
- Recommended Browser
- Documentation Accessibility
- Do Not Use Database Tools to Modify Oracle Applications Data
- About Oracle

Intended Audience

This guide is aimed at the following users:

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

This guide assumes you have the following prerequisites:

- Understanding of the company business processes.
- Knowledge of products and services as defined by your marketing policies.

- Basic understanding of Oracle applications and Developer/2000.
- Basic understanding of SQL, PL/SQL, SQL* Plus programming.

Related Documentation and Training

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

Customer Relationship Management (CRM) Foundation

- *Oracle CRM Foundation Implementation Guide Release 11i*
- *Oracle CRM Foundation Concepts and Procedures Release 11i*
- *Oracle CRM Technology Foundation Implementation Guide, Release 11i*
- *Oracle CRM Technology Foundation Concepts and Procedures, Release 11i*
- *Implementing Oracle CRM: ERP Functional Checklist Release 11i*
- *Implementing Oracle CRM: Foundation Functional Checklist Release 11i*
- *Implementing CRM Applications Release 11i*
- *Oracle Marketing Encyclopedia System Release 11i*
- *Installing Oracle Applications Release 11i*
- *Oracle Applications Concepts Release 11i*
- *Oracle Applications System Administrator's Guide*
- *Supplemental CRM Installation Steps Release 11.5.1-11.5.3*

Enterprise Resource Planning (ERP)

- *Implementing Oracle HRMS Release 11i*
- *Oracle Inventory User's Guide Release 11i*
- *Oracle Bills of Material User's Guide Release 11i*
- *Oracle Receivables User Guide Release 11i*

Oracle Service Request

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

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Quality Online 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 Quality Online 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*

Oracle*MetaLink* 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 Oracle*MetaLin*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 Oracle*MetaLink* 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.

Recommended Browser

Oracle recommends the use of Microsoft Internet Explorer 5.5 or later for use with its CRM applications.

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 Java and SQL*Plus code examples in this document. The conventions for writing Java and SQL*Plus 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.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any representations regarding the accessibility of these Web sites.

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

Oracle Quality Online Introduction

This chapter provides an overview of the features and benefits of Oracle Quality Online. Topics include:

1.1 Oracle Quality Online Overview

Oracle Quality Online is a comprehensive, web based product that allows companies to manage the internal application development process by tracking product defects and enhancements. Defects are primarily identified by customer support representatives, developers, and/or quality assurance engineers. Allowing users to log new and review existing enhancement requests, the company gathers strategic information for user oriented functionality that helps them remain competitive.

Key features and benefits of Oracle Quality Online include the following:

- Configurable process management: Organizations can configure the software to mirror their own defect and enhancement management processes.
- Build better products: Product quality metrics are classified, gathered, and reported within defects, and functional suggestions are tracked within enhancements.
- Flexible prioritization: Each organization can configure prioritization criteria to ensure compliance with their service level goals.

- Close the service process loop: Organizations can achieve high levels of efficiency through the integration of their defect management process with other products in the Oracle CRM suite.
- Personalization: A powerful search and save mechanism allows users to create saved searches, saved creates, and saved reports that provide relevant information on demand.

Please see Appendix C Territory Setup for sample defect and enhancement flows for Oracle Quality Online.

1.2 Key Terms and Functionality

The following table contains the Oracle Quality Online Key Terms and definitions.

Term	Definition
Alerts	Alerts are optional short messages about scheduled outages or system issues sent from the system administrator. The Alerts bin is viewable from the Homepage.
Base Defect/Enhancement	When there are dependencies between defects and enhancements, a Base link is created to show the dependency. This is important for understanding the order in which defects must be handled. The link is visible on the Tree hyperlink on the Defect or Enhancement Details page.
Category	There are two Categories in Oracle Quality Online, Defects and Enhancements.
Defect	Defects are logged when errors, unexpected behavior, or any other issues are found that require development intervention.
Defect/Enhancement Owner	In most cases, the user responsible for the Defect or Enhancement at a specific phase. Ownership can be assigned automatically or manually.
Enhancement	Enhancement are requests to add new functionality.
Environment Variables	Environment Variables are used for tracking additional, user-defined environment information such as database version, browser version, etc.
Escalation	Escalations provide the means to identify, track, monitor, and manage situations requiring increased awareness and immediate action.

Term	Definition
Homepage	The Homepage is the application’s landing page. The Homepage provides an overview of work assigned to individuals and/or groups, alerts and information about the system, and quick navigation to other key areas of the application.
Key Audits/Audits	Records showing who has accessed Oracle Quality Online, and what operations they have performed. *Key Audits* are a subset of Audits, hard coded in Oracle Quality Online, available in Notes Display Options.
Lifecycle	In Oracle Quality Online, the product lifecycle stages are used with product versions to further refine the defect definition. Seeded Lifecycle stages are Alpha, Beta, Development, and Production. They appear in the Product Status drop down list in Defect Details.
Link Type	Link Types in Oracle Quality Online reflect relationships between objects. Link Types are configurable and allow relationship definitions to include dependencies.
List of Values (LOV)	The LOV is the list of choices that appears when you click Go next to a text box. The Go button indicates that the user must choose from the associated, predefined list. The LOV differs from a drop down box, which displays a limited selection of data while the LOV is more extensive.
Note Templates	Configurable templates are designed to guide users in the creation of Defects and Enhancements through a sequence of questions. Questions and responses are saved in Note format. Templates are configurable and are displayed based on usage
Note Token	Note Tokens allow any text, e.g. *http://*, *bug 123*, *patch 123*, to be hyperlinked according to specific rules . Users often type references directly into note text. Setting hyperlinks in the text provides future users with an easy way to navigate directly to these references.
Notification	Users can request email notification at key points in the Defect and Enhancement management process, for example, when the Status or Phase of a Defect changes or when a Defect is closed.
Phase	Configurable phases are intended to reflect the business process steps for handling defects and enhancements and tracking progress from one stage to another. If desired, changing the phase can trigger assignment to the team or individual responsible for the next phase.
Phase Status	Each phase may go through many states, and the phase status reflects the current state of this phase.

Term	Definition
Primary Contact	The Primary Contact is the filer or the designated liaison for the filer, responsible for problem definition and communication. The Primary Contact may default to the user logging a defect or may be manually assigned at creation. There is only one Primary Contact. All other contacts are displayed on the Notifications tab.
Profile	An ongoing, individual administrative function for setting up and maintaining personal user roles, responsibilities, and information.
Quick Create	Quick Creates are user profiles, set up for frequently recurring criteria, e.g. product, platform, version, etc.These speed up the creation of defects and enhancements by providing relevant default information automatically.
Resolution / Closure Times	Resolution Times allows organizations to define the levels of service required to complete the defect lifecycle.
Resource Group	A Resource Group in Oracle Quality Online is used for assignment to a virtual entity.
Source Files	Files that were modified during the defect management process.
Tasks	Tasks are a basic unit of work within Oracle Quality Online, and contain information relating to assigned activities. Tasks can be used for activities that are pertinent to defects and enhancement but whose details do not add to the resolution of, or knowledge within, the defect or enhancement. For example, a request to check documentation, or a note to follow up with someone else.
Templates	Configurable templates are designed to guide users in the creation of Defects and Enhancements through a sequence of questions. Questions and responses are saved in note format. Templates are configurable and are displayed based on usage.
Territory	Configurable Territories consist of qualifiers and their values. The Territory Qualifiers (see below) determine the automatic assignment of defects and enhancements. For enhancements, Territories may be mapped to the product management organization. Territories and their associated Qualifiers are application specific.

Term	Definition
Territory Qualifiers	Qualifiers are the criteria used to delineate a territory. There are two types of qualifiers: transaction qualifiers and resource qualifiers. Use transaction qualifiers to specify how the territory module assigns transactions. This includes accounts, leads, opportunities, and service requests. Examples of transaction qualifiers include: customer name, postal code, state, and product interest. Resource qualifiers specify what attributes are used to select the individuals responsible for those transactions. Examples include job title, competence, and language.
Territory Type	Use territory types to group transaction qualifiers used for creating territories. This saves you time when you are creating similar territories. Suppose you want to create territories by geographical area. In this case you can create a territory type with the Country and Postal Code qualifiers.
Tracking Groups	Configurable list of group specific keywords. For example, if the User Interface group needs to report on the types of UI exceptions, a UI Tracking Group can be created.
Type	A configurable list that classifies the defect or enhancement. Examples are Performance, User Interface, and Translation. Type can be used to determine phase and template usage. Types are also useful for reporting purposes.

1.3 New in this Release

Oracle Quality Online contains the following new functionality in this release.

- **Customer search by name and number**: Users are able to enter and search by either the customer name or number in the Create Defect, Defect Details, Quick Create, and Advanced Search screens. Additionally, Customer Name and Number can be entered in the main user fields.
- **Group workload management**: There are two additional key summary views, Open Defects my Groups Own and Open Enhancements my Groups Own. This allows resources to see the number of open defects and enhancements assigned to their group(s). Also, the key summary views Defects with Open Tasks I Own, and Enhancements with Open Tasks I Own have been changed to Defects with My Open Tasks and Enhancements with My Open Tasks, respectively. The new summary view lists all the defects. enhancements that have an Open Task for which the person logged in is the owner or the assignee.

- **Standardized assignment rules:** Assignment has been standardized to make automatic and manual assignment the same, based on the following rules:
  - Defect owner must have the Defect and Enhancement Owner role assigned.
  - Primary Contact must have the Defect and Enhancement Primary Contact role assigned.
  - Any individual, group, or team, identified as a resource, may be assigned as a notification contact.
- **Expanded default views:** Users are able to set default note detail viewing level when opening a defect or enhancement.
- **Advanced Search Improvements:**
  - Context-enabled keyword search functionality added for enhancements. Also, the ability to search by Service Request, Escalation or Task Number.
  - The ability in both Advanced Search and Reports to search on component and subcomponent without specifying a product.
- **Hyperlinks in Notes:** Extended hyperlink functionality has been added to improve usability. Users are able to define what should be parsed and rendered as a hyperlink in Note Details.
- **Associate external objects to defects and enhancements:** Third party objects, such as patches, external service requests or any other object can be associated with defects or enhancements.
- **Option to make Phase Status mandatory:** Organizations can make phase status optional or mandatory for both open and closed defects and enhancements.
- **Resolution Time for Enhancements** has been removed.
- **Setup Changes:**
  - Assigning JTF Roles to Each User can now be done using the System Administrator Console.
  - Creating Task Contact Types has been deleted since this is no longer necessary in Oracle Quality Online
  - Setting up Alerts: the steps for administering and sending alerts has changed.
- **Please note the following:**

- There have been some changes to the Oracle Customer Relationship Management (CRM) Foundation modules. Please see the most current CRM Foundation documentation listed in the Preface of this guide.
- Please review C*hapter 6: Profile Options and Concurrent Programs,* and *Appendix A: User Permissions* for updated profile and permission information.

2

Technology, Requirements, and Performance

This chapter covers:

- Architectural Overview
- Minimum Hardware Requirements
- Minimum Software Requirements

2.1 Architectural Overview

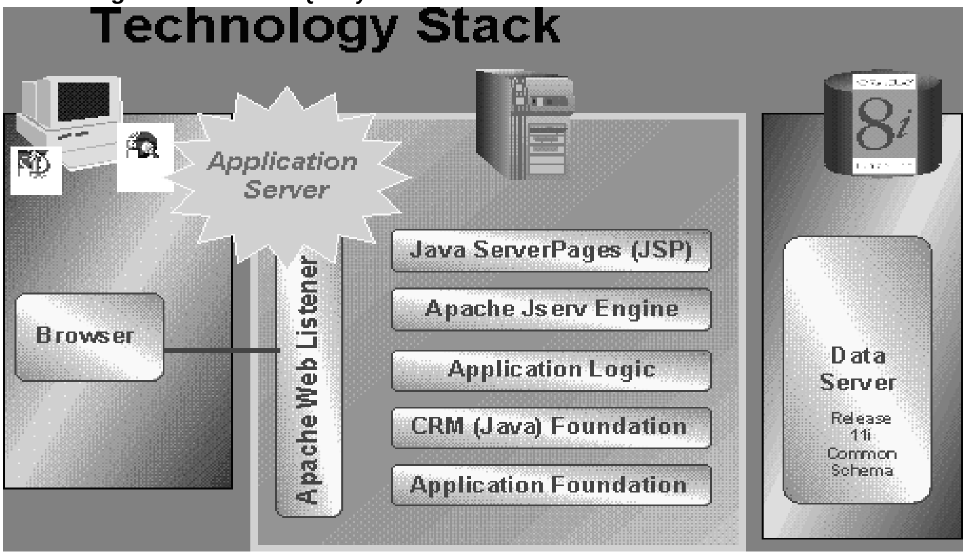
Oracle Quality Online's architecture is a 3-tier system comprised of:

Data Tier - The data tier includes Oracle ERP and CRM main tables which comprise their common schema. These are driven by the Oracle 8*i* database. Most of the CRM application business logic that is written in PL/SQL is also in the data tier.

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

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

Figure 2–1 Oracle Quality Online Architectural Overview



2.2 Minimum Hardware Requirements

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

Oracle recommends the following server requirements:

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

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

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

This table lists the Oracle Quality Online hardware requirements.

Hardware	Requirement
CPU	2 CPUs minimum, 4 or more highly recommended
Memory	1GB minimum
Disk Space	22GB, including 1GB in /tmp (plus an additional 9GB if installing from a staging area)

2.3 Minimum Software Requirements

The minimum software requirements are listed in the following table.

Table 2–1 Minimum Software Requirements

Software	Requirement
Database	8.1.7 version of Oracle8*i*
Middle-Tier	The middle-tier requirements are an Apache 3.0 version Web server and Oracle Forms 6.0 server (as a part of ERP 11*i* implementation). For faster page serving, you can also use a caching server in front of the Web server series. The caching server (for example, Calypso) then serves the static content through the cached TCP/IP packets (or cached pages). An invalidated cache results in service requests being directed to the Web servers.

3

Dependency Requirements and Verification

This chapter describes the installation setup dependencies for Oracle Quality Online 11*i*. Specific, step-by-step setup tasks can be found in Chapter 5: Implementation Tasks.

Topics include:

- Product Footprint
- Mandatory Dependencies
- Conditional Dependencies
- Verifying the Implementation

3.1 Product Footprint

Oracle Quality Online is part of the Oracle suite of integrated applications that share components and depend on each other for functionality. The layered architecture of the applications ensures that they interact with each other and function in consistent ways. Oracle Quality Online is integrated with, and relies on, other applications and modules for data transaction, process management, and organization.

An overview of the functionalities of these modules is presented in this section. The remaining sections of this chapter detail the setup dependencies and steps for Oracle Quality Online.

Figure 3–1 Oracle Quality Online Footprint:

***not products**

3.2 Mandatory Dependencies

Oracle Quality Online relies on several Customer Relationship Management (CRM) Oracle and Enterprise Resource Planning (ERP) modules for its data and functionality. These modules are critical for Oracle Quality Online workflow and user setups. Throughout the application lifespan, it will be necessary for system and Oracle Quality Online administrators to update user information, and modify the business workflow.

3.2.1 Oracle Customer Relationship Management (CRM) Foundation

Oracle CRM Foundation provides the core application components, functionality, and data for Oracle Quality Online.

For information on CRM Foundation usage, please see the Other Sources of Information section in the Preface of this guide.

- **Notes**: Notes record descriptive, textual information generated by users about defects and enhancements.
- **Resource Manager**: Resources are the employees required to accomplish objectives. Resource Manager is used to import and view resources, define

resources and roles, create teams and groups, and organize resources within those teams and groups. Note the following:

- It is necessary to import employees who will be Primary Contacts or owners into Resource Manager to enable Owner and Primary Contact assignments.
- The user functioning as the Oracle Quality Online Administrator must be imported as a resource with the MES Administrator Resource role in order to be able to set up MES.
- A Defect and/or Enhancement Owner must have the *Defect and Enhancement Owner* role (usually a developer or someone involved in the solution process).
- A Primary Contact must have the *Defect and Enhancement Primary Contact* role (a primary contact not involved in the resolution process).
- It is necessary to run the Synchronize Employee concurrent request in order for changes to an existing resource to become effective.

- **Territory Manager**: Territory Manager is a tool allowing you to define the rules for automatic assignment of defects.
- **Assignment Manager**: Assignment Manager is the assignment engine. The assignment process uses criteria based on preferred Resources, qualifiers and Territories. It is necessary to set up Assignment Manager to automatically assign all Defects and Enhancements.
- **Task Manager**: Task Manager provides a single model for all tasks processed by the CRM suite. Tasks are created and assigned to groups or individuals.
- **Escalation Manager**: Escalation Manager allows identification, tracking, and monitoring of situations that require increased attention and quick action.

3.2.2 Oracle Enterprise Resource Planning (ERP)

- **Oracle Inventory**: Oracle Inventory is used to define and maintain product, component, subcomponent, platform, and associated version information.
- **Oracle Bills of Material (BOM)**: A product structure tool that defines product relationships. BOM allows the creation of products containing multiple components and subcomponents.
- **Oracle Human Resources Management System (HRMS):** HRMS is used to define and maintain employee information used for assignments.

- **Oracle Receivables:** Customers are set up in Oracle Receivables.

3.3 Conditional Dependencies

The following are optional but highly recommended modules that allow Oracle Quality Online to utilize additional data and improve functionality:

3.3.1 Service Request/Oracle TeleService

Integration with Service Request, included with TeleService, facilitates an efficient support process for customers and internal employees. Support agents can create a defect or enhancement request in response to a Service Request.

3.3.2 Knowledge Base Submit for Defects

While all defects can be submitted to the Knowledge Base, it is a business process decision to determine whether all or only closed defects should be submitted. Entries submitted to Knowledge Base are published to agents and customers. This enables users to search for previous solutions.

3.3.3 Oracle Marketing Encyclopedia System (MES)

Oracle MES must be set up to use the Alerts bin on the Homepage. Alerts are short messages sent to subscribers from the system administrator regarding scheduled outages or other system issues. For more information see the *Oracle Marketing Encyclopedia System Implementation Guide, Release 11i*.

3.4 Verifying the Implementation

If defects and enhancements can be created, then the implementation has been successful. To verify the implementation, create a defect or enhancement, then check the defect or enhancement details for completeness and accuracy. If a defect can be successfully pushed to the Knowledge Base, then that aspect of the implementation has been successful.

4

Implementation Overview

This chapter covers the implementation and installation overview. Topics include:

- Process Description
- Suggested Implementation Checklist
- Running Rapid Install

4.1 Process Description

Oracle Quality Online is reliant on other Oracle applications for its functionality. In order to successfully implement Oracle Quality Online, you must set up its mandatory, and optionally, its conditional dependencies.

4.2 Suggested Implementation Checklist

The following table contains high level implementation set up steps in a suggested order. For detailed instructions please see the relevant chapters.

Table 4–1 Implementation Checklist

Step	Description/	Tech Stack	Responsibility/(s)	Req.
1	User Setup	Forms	Multiple (see Chapter 5 Implementation Tasks)	Yes
2	Escalations Setup (requires Tasks)	Forms	CRM Administrator (see Chapter 5 Implementation Tasks)	No
3	Tasks Setup	Forms	CRM Administrator (see Chapter 5 Implementation Tasks)	No

Step	Description/	Tech Stack	Responsibility/(s)	Req.
4	Notes Setup	Forms	CRM Administrator (see Chapter 5 Implementation Tasks)	Yes
5	Product, Component, Sub-Component Setup	Forms	Inventory / Manufacturing and Distribution Manager (see Chapter 5 Implementation Tasks)	Yes
6	Platform Setup (if using Platforms)	Forms	Inventory / System Administrator (see Chapter 5 Implementation Tasks)	No
7	Product Group Setup (if using Product Groups)	Forms	Inventory / System Administrator (see Chapter 5 Implementation Tasks)	No
8	Processes	HTML	Oracle Quality Online Administrator (see Chapter 5 Implementation Tasks)	Yes
9	Oracle Quality Online Lookups	HTML	Oracle Quality Online Administrator (see Chapter 5 Implementation Tasks)	Yes
10	Oracle Quality Online Standards	HTML	Oracle Quality Online Administrator (see Chapter 5 Implementation Tasks)	Yes
11	Oracle Quality Online Alerts	HTML	Oracle Quality Online Administrator with Resource role of MES Administrator (see Chapter 5 Implementation Tasks)	No
12	Assignment Setup including Territory Qualifiers, Territory Types, Territories, Escalation Territories, Territory Package Generation	Forms	CRM Administrator (see Chapter 5 Implementation Tasks)	Yes
13	Oracle Quality Online System Profiles	Forms	System Administrator (see Chapter 6, Profile Options and Accounts)	Yes

4.3 Running Rapid Install

Rapid Install (RapidWiz) helps you install a complete set of Oracle Applications products at the latest available maintenance pack level. It installs the required technology stack and creates the Oracle Applications database. You can use Rapid Install to install any of three environments: a production installation, a test installation, and an installation of the Vision Demo database. In addition, Rapid Install lets you license products, country-specific functionality, and languages.

Rapid Install stores the parameters you choose in a configuration file, and then uses that file as a road map to perform the installation or upgrade. It installs all necessary components, and then sets up your database listeners, web listener, web server, Forms server, and Reports server.

In a single-node installation, all servers (database, concurrent processing, forms, and web) are installed on a single node. This type of installation is generally used for smaller installations and for demonstration purposes. In a two-node installation, one node contains the database server, concurrent processing server, and reports server, and another node contains the forms server and the web server. A multi-node installation sets up any combination of servers you specify, on any number of nodes. This type of installation provides the most scalability.

For more information on Rapid Install, see Installing Oracle Applications and Upgrading Oracle Applications.

5

Implementation Tasks

5.1 Overview of Implementation Tasks

This chapter covers the following implementation tasks:

- Setting up Users
- Setting up Dependencies
- Oracle Quality Online Administration

5.2 Setting up Users

This section covers the following Oracle Quality Online user related topics:

- Login Interfaces
- Responsibilities, Roles, and Permissions
- User Types Overview
- User Setup

Note: Users can also be set up using the Oracle System Administrator Console. Please see the following documentation for additional user setup instructions and information:

- *Oracle CRM Technology Foundation Implementation Guide, Release 11i*
- *Oracle CRM Technology Foundation Concepts and Procedures, Release 11i*

5.3 Login Interfaces

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

5.3.1 Oracle Applications Forms Login

The System Administrator (sysadmin) controls a variety of parameters relating to Oracle Quality Online, and also assigns responsibilities.

Before making Oracle Forms settings, verify that Oracle Application is up and running. Because some setup steps require running concurrent programs, you must ensure that the Concurrent Managers are running. Consult your Applications System Administrator for additional information.

For more information on Oracle Applications, refer to *Oracle Applications Concepts, Release 11i*.

5.3.2 JTF (HTML) Console

The JTF console is where all users log in to access Oracle Quality Online and other HTML-based applications. The menus that appear after login depend upon the roles and responsibilities assigned to the user. Users will be unable to access application functionality until they have been assigned both roles and responsibilities.

5.4 Responsibilities, Roles, and Permissions

During the implementation process and throughout the Oracle Quality Online application lifespan, it will be necessary for the system administrator or the Oracle Quality Online Administrator, if in possession of the necessary Responsibilities, (see Section 5.5.2 below) to assign roles, responsibilities, and permissions to users.

This section discusses the terms ***roles***, ***responsibilities***, and ***permissions***. For discussion of ***system profile values***, see Chapter 6: Profile Options and Accounts.

A ***role*** is a collection of page- and function-level permissions that are granted to maintain application security. For example the Oracle Quality Online roles assigned to the Internal Regular User (CSS_DEF_DEFECT_MODIFY_USER and CSS_DEF_ENH_MODIFY_USER) allow them to work with both defects and enhancements, but do not allow them to perform Oracle Quality Online Administrator activities. A ***permission*** is the smallest unit making up a role. Permissions dictate exactly which actions the user can perform. Oracle Quality Online user permissions include editing, creating, and viewing defects.

Responsibilities control the presentation of menus, tabs, and screens. For example, the Oracle Quality Online User responsibility gives access to the user set of menus while the Oracle Quality Online Administrator responsibility allows access to the administration screens.

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

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

5.5 User Types Overview

5.5.1 System Administrator (Seeded)

The System Administrator (sysadmin/sysadmin) username and password are supplied with the product. The sysadmin will have all available system and module permissions and be able to access the full spectrum of Oracle Forms responsibilities in order to complete the implementation process.

Note: Please change the password before setting up Oracle Quality Online for security purposes. Log on to Oracle Forms as sysadmin. Navigate to System Administrator > Security > User > Define. Enter query mode by selecting F11. Query sysadmin by entering SYSADMIN in the User Name field and then selecting Control F11. Change the password in the Password Field. You must tab to reenter and confirm. Save and close form.

5.5.2 Oracle Quality Online Administrator

The Oracle Quality Online Administrator function, depending on the organization's business practices, can be assigned by the sysadmin to another user, responsible for configuring and managing the following within the Oracle Quality Online application:

- Processes: Categories, Types, Phases, and Phase status.
- Standards: Templates, Template options, Resolution Times and Note Token Rules.
- Lookups: Priorities, Severities, Languages, Tracking Groups, Environmental Variables, and Miscellaneous.
- Alerts: Alert Administration, Send Alert, and Alert Group.

Oracle Quality Online Administrator Responsibilities are:

- Oracle Quality Online User
- Oracle Quality Online Administrator
- Human Resources Manager (for HRMS setup)
- CRM Administrator
- Manufacturing and Distribution Manager (for Inventory Setup)
- Knowledge Base System Administration (for Knowledge Base Setup): The Oracle Quality Online Administrator must be set up with the *i*Support Administrator role and the Knowledge Base System Administrator responsibility.

Note: The user functioning as the Oracle Quality Online Administrator must be imported as a resource with the MES Administrator Resource role in order to be able to set up MES. See Section 5.6.5 below for detailed steps.

5.5.3 Oracle Quality Online User

The Oracle Quality Online User Responsibility is DEMS User. A typical Oracle Quality Online user will create, view and update both Defects and Enhancements. If desired, the DEMS User can be assigned the CSS_DEF_DEFECT_RESOLUTION role and the CSS_DEF_ENH_RESOLUTION roles enabling the user to update resolutions as well.

5.6 User Setup

Below are step-by-step instructions for creating users in Oracle Quality Online. Please see the current documentation for Oracle HRMS (employee users) and/or Oracle Receivables/TCA (customer users) for complete implementation instructions. The Oracle HRMS instructions below are intended for rapid setup of your Oracle Quality Online users.

5.6.1 Creating an HR employee

If your HR system is complete and Oracle Quality Online employee users are already set up, you will not need to Create HR employees. Skip to section 5.6.2, Creating an FND User and Assigning Responsibilities.

1. Log in to Oracle Applications as System Administrator. When the Java applet has loaded, select your Human Resources administration responsibility.

2. Navigate to People > Enter and Maintain. Click New at the bottom of the Find Person form. The People form appears.
3. Enter User first and last names in the name fields. Select user gender from the Gender drop down box. Select title from the Title LOV. Select Type from the Type LOV.
4. Enter country specific tax identification number. The tax identification number is mandatory.
5. On Personal tab, enter date of birth. On Office Details tab, enter email address.
6. Navigate to File > Save and Proceed to save and clear the form. Continue to Create Employees as necessary.
7. To confirm that the employee has been created, navigate to People > Enter and Maintain. Use the Find form to locate the employee you just created. Note the Employee Number.

5.6.2 Creating an FND User and Assigning Responsibilities

1. Log in to Oracle Applications as System Administrator. When the Java applet has loaded, select the System Administrator responsibility. Navigate to Security > User > Define. The Users form appears.
2. In the Users form, enter a User Name. For example, when setting up the Oracle Quality Online administrator, DEMS_Admin could be used.
3. To associate an FND User with an employee, use the Person LOV in the User Form. To associate an FND User with a customer, use the Customer LOV. Search for the user by clicking on the blue tab to the left of the appropriate field and entering a partial name to limit the search results. Select the desired association by double clicking on the name.
4. Tab to Password field and enter a password. Tab to clear the field and re-enter the same password to validate.
5. On the Responsibility tab, click in the Responsibility field to activate it. Search for DEMS responsibilities by clicking on the blue tab to the left and entering `DE%` to limit the search. Double click to select. For example, select DEMS User only for a regular DEMS user and both DEMS User and DEMS Administrator for the Oracle Quality Online Administrator. Users with a third responsibility, DEMS Lookups and Concurrent Programs, will be able to check Oracle Quality Online lookups and run concurrent programs for the application.

Note: The Oracle Quality Online Administrator will require additional responsibilities to perform other administrative tasks. Please see above, Section 5.5.2.

6. Enter Effective Dates if they do not appear automatically.
7. Navigate to File > Save and Proceed to save and clear the form. Or click the diskette icon at the top of the screen.

5.6.3 Configuring the User profile

To determine the Default Application and Responsibility ID for all Oracle Quality Online users see Steps 1-6 below.

1. Log in to Oracle Applications as System Administrator. When the Java applet has loaded, select the System Administrator responsibility. Navigate to Security > Responsibilities > Define.
2. Press F11 for query mode and enter the responsibility DEMS_USER in the Responsibility Name field.
3. Execute the query by pressing Control F11. The data for the DEMS_User responsibility is displayed.
4. From the menu choose Help > Diagnostics > Examine. If a password is called for, enter the password set for apps user.
5. In the Examine Field and Variable Values form, Select the LOV for the Field. Double click the RESPONSIBILITY_APPLICATION_ID. The Value for the APPLICATION_ID should always be 514 which is the internal application ID for Oracle Quality Online.
6. Re-select the LOV for the Field and double click RESPONSIBILITY_ID. Make a note of the Value for the RESPONSIBILITY_ID, and select OK.
7. From the menu select File > Close Form.
8. In the System Administrator Navigator, select Profile > System. In the Find System Profile Values screen check User and accessing the LOV, select the username you created.
9. Uncheck the Profiles with no Values checkbox and enter `JTF%PROFILE%` in the Profile field. Select Find.
10. In the User column, ensure that the JTF_PROFILE_DEFAULT_APPLICATION for the user is set to 514. If it is not, change it.

11. In the User column, set the JTF_PROFILE_DEFAULT_RESPONSIBILITY to the RESPONSIBILITY_ID number identified above.
12. Navigate to File > Save and Proceed.

5.6.4 Assigning JTF Roles to Each User

The minimum roles for DEMS User are CSS_DEF_DEFECT_MODIFY_USER, and CSS_DEF_ENH_MODIFY_USER. The minimum role for DEMS Administrator is CSS_DEF_ADMIN.

1. Log in to the JTF login page as sysadmin. Navigate to Users > User Maintenance.
2. Search for the user using the drop-down box and LOV.
3. Click Go and select the user name link.
4. Click the Roles button. The User Role Mapping page appears.
5. From the Available Roles column, select the desired Role and click Assign (>) Move each role individually.
6. When done assigning Roles, click Update to set the new values, or Restore to return to the previous values.

5.6.5 Importing an HR Employee as a Resource

This must be done for users who will be Primary Contacts or owners. In addition, the user functioning as the Oracle Quality Online Administrator must be imported as a resource with the MES Administrator Resource role in order to be able to set up MES

Note that it will be necessary to run the Synchronize Employee concurrent request for changes to an existing resource to become effective.

1. Log in to Oracle Applications as System Administrator. When the Java applet has loaded, navigate to CRM Resource Manager > Maintain Resources > Import Resources. The Selection Criterion window appears.
2. Search for employee in the Name Field LOV or enter the employee number. Select the employee name.
3. Click the Search button. Verify that the Select box is checked in Search Results, and that employee Category, Number, Name, and Organization data displays.
4. Click Create Resource button. The Default Values form appears.

5. Click on the Role field to access the LOV. Select an Oracle Quality Online Role. Seeded Resource Roles are Defect and Enhancement Owner (usually a developer or someone involved in the solution process) and Defect and Enhancement Primary (a primary contact not involved in the resolution process). For the MES role appropriate to the Oracle Quality Online Administrator, select MES Administrator. Click OK.
6. Set Role Start and End Dates if desired. Click OK. The Selected Resources window appears. Click Save Resources to confirm.
7. Click the diskette icon at the top of the screen to save, and then close the form.

5.6.6 Creating Resource Groups

It is recommended that each group receiving automatic assignments have a resource group for assignment, rather than individuals, in order to insure that issues are covered if an employee is reassigned or is unavailable. Resource Groups should be used as the Primary Owner for all Territories.

1. Log in to Oracle Applications as System Administrator. When the Java applet has loaded, navigate to CRM Resource Manager > Maintain Resource > Groups. The Define Groups form appears.
2. Enter a name and description for the Resource group in the respective fields.In the Email Address field, enter an address for the Resource Group.
3. Click the diskette icon at the top of the screen to save. A number will be automatically assigned.
4. On the Roles tab, click the Roles Type field LOV. Select Defects and Enhancements to associate the Resource Group with Oracle Quality Online.
5. Click the Roles LOV and select Defect and Enhancement Owner to associate the Resource Group with the Oracle Quality Online resource roles.
6. Repeat Step 4. Click the Roles LOV and select Defect and Enhancement Primary Group to complete association of the Resource Group with the Oracle Quality Online resource roles.
7. Set Role Start and End Dates if desired
8. Click the diskette icon at the top of the screen to save, and then close the form.

5.6.7 Adding an Employee to a Resource Group

1. Logon to Oracle Applications as System Administrator. Navigate to CRM Resource Manager > Maintain Resources > Groups. The Define Groups form appears.
2. Query the desired Oracle Quality Online Resource Group
3. Select the Members tab. Go to a blank record and Click in the Category field to select the resource category (Employee, Other, Partner)
4. Identify the employee by name or number. Employees must be imported as resources or they will not display in LOV.
5. Click the diskette icon in the menu bar to save

5.6.8 Adding Resource Roles

1. Logon to Oracle Applications as System Administrator. Navigate to CRM Resource Manager > Maintain Resources > Groups. The Define Groups form appears.
2. Query the desired Resource Group.
3. Select the Roles tab. Go to a blank record and Click in the Role Type field and select *Defect and Enhancement*.
4. Select the Defect and Enhancement Owner Role for owner and then do the same for Defect and Enhancement Primary role.
5. Click the diskette icon in the menu bar to save.

5.7 Setting up Dependencies

This section covers setup steps for Oracle Quality Online dependencies.

Please refer to the current documentation for Oracle Inventory and Oracle CRM Foundation for complete implementation instructions. The following setup steps are specific to Oracle Quality Online allowing for a rapid implementation.

5.8 Setting Up Oracle Inventory Management

All product items, components, sub-components and platforms must be set up as Inventory Items in order to be accessible in Oracle Quality Online. Product hierarchies must be set up with Bills of Materials (BOM). For further information, please see the *Oracle Inventory User's Guide Release 11i*.

Note: To enable users to create defects and enhancements based upon service requests, set up Oracle Inventory and Oracle Bills of Materials as a shared structure across service (Oracle TeleService) and engineering (Oracle Quality Online).

It can be advantageous to plan your system so that you use the same product structure for sales, shipping, service and engineering to allow mapping to engineering cost/revenue reports. Saleable products that are not engineering products should be linked as the parent of the engineering product through Bills of Materials.

If your inventory items are already set up please make sure that changing flags will not affect other applications:

- If you want to enable an item to be tracked as a product in Oracle Quality Online, check the Defect Tracking Enabled box on the Service tab in the master item setup. (See 5.8.1 below for detailed steps.). Setting this flag allows the item to be visible in the Product LOVs. Do this only if you want to create products for use in Oracle Quality Online.
- To enable Bills of Materials, which allows product hierarchy creation, ensure that the Bills of Materials enabled flag is checked. Components and subcomponents will be related to the products enabled above. (See 5.8.2 below for detailed steps.)
- To allow version tracking, the Revision Control box on the Inventory tab in the master item setup must be checked. (See 5.8.1 below for detailed steps.)

5.8.1 Setting Up Inventory Items

Oracle Inventory uses the concept of a master organization in its structure. The master organization holds all of the information on product items.

1. Log on to Oracle Forms by using the link provided by your System Administrator: http://<hostname>:<Port_number>/dev60cgi/f60cgi.
2. Log on as sysadmin. Select the Inventory Responsibility.
3. Navigate to Items > Master Items and double-click Master Items. Select your inventory organization from the list. The Master Item form opens.
4. On the Master Item form enter your Item and Description. These are mandatory fields. Select the Inventory tab.

5. To enable Bills of Materials, ensure that the Bills of Materials enabled flag is checked.
6. To allow version tracking, check the Revision Control flag on the Inventory tab. To set up versions, select Tools > Revisions and input your version numbers in ASCII order. Descriptions are mandatory for versions to be visible in Oracle Quality Online.
7. To enable product tracking in Oracle Quality Online navigate to the Service tab by selecting the small arrow to the right of the last visible tab. This will present additional tabs. Select the Service tab. Check the Defect Tracking Enabled box.
8. From the menu bar, select File > Save.

5.8.2 Setting up Products

After you have set up the master organization, you then define items within your inventory. The steps below can assist you in setting your items.

5.8.2.1 Setting up Items

1. Log on to Oracle Applications as System Administrator. In the Responsibility window, select the Manufacturing and Distribution Manager responsibility. Navigate to Inventory > Items > Master Items. Select the appropriate organization. The Master Item form opens.
2. Enter the Inventory Item name and description.
3. In the Inventory tab, check the Inventory Item checkbox.
4. In the Bills of Material tab, check the BOM Allowed checkbox.
5. Check Defect Tracking Enabled in the Service tab. The tab can be found by clicking on the right-hand arrow button that expands the tab display.
6. Click the diskette icon on the menu bar to save.
7. From the menu bar, select Tools > Organization Assignment and, using the checkboxes, assign to all appropriate organizations in the Organization Assignment form.
8. Save and close the form.

5.8.2.2 Setting up Item Revisions

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, select the Manufacturing and Distribution Manager responsibility. Navigate to Inventory

> Items > Master Items. Select the appropriate organization. The Master Item form opens.

2. Query the item by hitting F11 in the Item Field. Execute the query by hitting Control F11. Select the item.
3. Select the Item, navigate to Tools > Revisions. The Item Revisions form opens.
4. Enter in a unique revision in the Revision column using an alphabetical format (e.g. A, B, C, etc.)
5. Enter the product version in the Description field.
6. Enter in a valid effective date.
7. Save and close the form.

5.8.2.3 Setting up Bills of Materials (BOM) for Oracle Quality Online

Oracle Bills of Materials (BOM) allows the linking of products to components, and components to subcomponents in a hierarchical manner.

1. Log on to Oracle Forms as System Administrator. In the Responsibility window, select the Manufacturing and Distribution Manager responsibility. Navigate to Bills of Materials > Bills > Bills. Select the appropriate organization. The Bills of Material form opens.
2. Query the product from the Item LOV, by hitting F11 and entering % in Item field in the form that opens. Execute the query by hitting Control F11. Select the product from the Item form list.
3. In the Main tab, select a component from the Component LOV or from the Components Items list that appears.
4. Select File > Save and Proceed.
5. To link sub-components to components, repeat steps 2-3 except query the component instead of the product in step 2.
6. Save, and close the form.

5.8.3 Setting up Platforms

To create platforms, you must first define at least one Category and one Category Set.

Oracle Inventory allows you to set up your inventory items in categories. Categories are either product or platform related. A product or platform category has a many-to-many relationship with inventory items.

You use the Category Flexfield Structure in Oracle Inventory to define categories for products and platforms, and group them.

After you set up categories, they can then be grouped into category sets. You can define an unlimited number of categories and group subsets of your categories into category sets. A category can belong to multiple category sets. You can assign a category to a category set either at the time you define a category set or at the time you assign an item to the category.

Oracle Quality Online expects two category sets - one for platform definition, and the other for defining product groups.

Use of product categories and category sets also allows the display of different product categories to different user types, e.g., employees or customers. This can be accomplished by setting the profile option, Service: Default Category Set at a responsibility level. See Oracle Inventory documentation for more details.

5.8.3.1 Creating Platforms

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, select the Inventory responsibility. Navigate to Items > Master Items. Select the appropriate organization. The Master Item form opens.
2. Enter platform in Item field (e.g. Unix, Windows etc.)
3. Enter description in Description field.
4. Select File > Save and Proceed.
5. Enter all platforms in the same way, then close the form.

5.8.3.2 Creating Platform Revisions

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, select Inventory. Navigate to Items > Master Items. Select appropriate organization. The Master Item form opens.
2. Press F11 for query mode and enter your query in the Item field. Execute your query by hitting Control F11. Select the item.
3. Navigate to Tools > Revisions.

4. In the Revisions column, select an alphabetically based revision code (e.g. A, B, C, etc.).
5. Enter a description in the Description field.
6. Enter an Effective Date.
7. Select File > Save and Proceed.
8. Continue until all Revisions have been entered. Then save, and close the form.

5.8.3.3 Creating Oracle Quality Online Platform Key Flexfield Structure

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, select the Manufacturing responsibility. Navigate to Inventory >Setup > Flexfields > Key > Segments. The Key Flexfield Segments form opens.
2. Press F11 for query mode and enter Oracle Inventory in the Application field. Execute the query by pressing Control F11. The structure for Oracle Inventory will display.
3. Click a record in the Code list. Click the New record icon, located on the menu bar. In the new record, enter the a code in the Code column such as PLATFORM_CATEGORY.
4. Enter the title in the Title field.
5. Enter a description in the Description field.
6. Click the Segments button. The Segments Summary form appears.
7. Enter a name, window prompt and number in the corresponding fields.
8. Using the Column LOV, select a Segment.
9. For multiple segment structures, repeat steps 7-8.
10. From the main menu, select Save. Close the form.
11. Back in the Key Flexfield Segments form, check the Freeze Flexfield Definition checkbox.
12. Click the Compile button. Click OK to confirm compilation.
13. Save, and close the form.

5.8.3.4 Creating Platform Categories against the Platform Key Flexfield Structure

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, select Inventory. Navigate to Setup > Items > Categories > Category Codes. The Find Categories window opens.
2. Using the Structure Name LOV, select the structure, then click the New button. The Categories form opens.
3. Select the flexfield structure from the Structure Name LOV.
4. Enter a unique category name in the Category field.
5. Enter a description in the Description field.
6. Enter other categories as needed.
7. Save, and close the form.

5.8.3.5 Creating one Platform Category Set and Associating to all Platform Categories

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, select the Inventory responsibility. Navigate to Setup > Items > Categories > Category Sets. Select the appropriate organization. The Category Sets form opens.
2. Enter a unique Category Set name in the Name field.
3. Enter a description in the Description field.
4. Using the Flex Structure field LOV, query and select the flexfield structure.
5. Select a control level:
   - Master Level: Item assigned to this Category Set has the same category value in all organizations where it is assigned.
   - Org Level: Item assigned to this Category Set may have a different category value in each organization where it is assigned.
6. Using the Default Category LOV, select a default category. This is the default category used when assigning an item to the category set. For example, a category set may have a default category called *Unix-2*. After an item is assigned to *Unix-2*, you can override the default category and choose another relevant category for each item.
7. Click the Enforce List of Valid Categories checkbox.

8. Click in a blank field in the Enforce List of Valid Categories field, and, using the LOVs, select the categories.
9. Optionally, check the Allow Multiple Item Category Assignments checkbox. If you enable this feature, you can assign an item to multiple categories within a category set. If you do not enable this feature, an item can be assigned to exactly one category. In this case, an item can be assigned to only one default display category.
10. Save, and close the form.

5.8.3.6 Associating Platform Categories to Items that are Platforms

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, select the Inventory responsibility. Navigate to Setup > Items > Categories > Category Sets. Select the appropriate organization. The Category Sets form open.
2. Enter a unique name in the Name field.
3. Enter a description in the Description field.
4. Using the Flex Structure LOV, select the appropriate Flexfield Structure.
5. Select a control level:
   - Master Level: Item assigned to this Category Set has the same category value in all organizations where it is assigned.
   - Org Level: Item assigned to this Category Set may have a different category value in each organization where it is assigned.
6. Using the Default Category LOV, select a category.
7. Click the Assign button. The Item Assignments form opens.
8. Using the Item field LOV, enter an item name. Press F11 for query mode, then press Control F11 to execute the query. Select an item.
9. From the Category LOV, choose a category.
10. Save, and close the form.

5.8.3.7 Pointing Oracle Quality Online to the Category Set that Indicates which Items are Platforms

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, navigate to System Administrator > Profile > System. The Find System Profile Values form opens.

2. Using the Profile field LOV, query the profile `Service: Default Platform Category Set` in the Find field of the Profiles form.
3. From the appropriate LOV, select the platform category created in Section 5.8.3.3 Creating Oracle Quality Online Platform Key Flexfield Structure.
4. Save, and close the form.

5.8.4 Setting up Product Groups

Setting up Product Groups facilitates accurate and efficient executive reporting by categorizing multiple products into high-level groups.

5.8.4.1 Creating Oracle Quality Online Product Groups Key Flexfield Structure

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, select the Inventory responsibility. Navigate to Setup > Flexfields > Key > Segments. The Key Flexfield Segments form opens.
2. Press F11 for query mode and enter Oracle Inventory in the Application field.
3. Execute the query by pressing Control F11. The data for Oracle Inventory will display.
4. Click in a record in the Code list. Click the New record icon, located on the menu bar. In the new record, enter a code in the Code column such as PRODUCT_GROUP. Tab over to the Description field. The Title field will be automatically populated with the Code name data.
5. Enter a description in the Description field.
6. Click the Segments button. The Segments Summary form opens.
7. Enter a number in the Number field, then a unique product group name in the Name field. This automatically populates the Window Prompt field. Tab over to the Column field.
8. Using the Column LOV, select a segment listing value from the Columns form that opens.
9. Save and close the Form.

Note: The maximum size of your value set is 40. Users may need to scroll through the entire flexfield segment to see the entire list of values you entered.

10. Back in the Key Flexfield Segments form, check the Freeze Flexfield Definition button, and then click Compile. Click OK to verify the compilation, then close the form.

5.8.4.2 Creating all Product Groups Against Key Flexfield Structure

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, select the Inventory responsibility. Navigate to Setup > Items > Categories > Category Codes. The Find Categories form opens.
2. Using the Structure Name LOV, select the structure name, then click New. The Categories form opens.
3. Using the Structure Name LOV, select the structure name. Click New. The Categories form opens.
4. Using the Structure Name LOV, select the structure name
5. Enter a unique category name in the Category field.
6. Click in the Description field. In the form that opens, enter descriptions for each group in the fields, then click OK.
7. Save and then close the form.

5.8.4.3 Creating one Product Group Category Set

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, navigate to Inventory > Setup > Items > Categories > Category Sets. Select the appropriate organization. The Category Sets form opens.
2. Enter a unique Category Set name in the Name field.
3. Enter a description in the Description field.
4. Using the Flex Structure field LOV, query and select the flexfield structure.
5. Select a control level from the Controlled At LOV:
   - Master Level: Item assigned to this Category Set has the same category value in all organizations where it is assigned.
   - Org Level: Item assigned to this Category Set may have a different category value in each organization where it is assigned.
6. Using the Default Category LOV, select a default category. This is the default category used when assigning an item to the category set. For example, a category set may have a default category called *New*. After an item is assigned to *New*, you can override the default category and choose another relevant category for each item. Click OK.
7. Click the Enforce List of Valid Categories checkbox.

8. Click in a blank field in the Enforce List of Valid Categories field, and, using the LOVs, select the categories.

9. Optionally, check the Allow Multiple Item Category Assignments checkbox. If you enable this feature, you can assign an item to multiple categories within a category set. If you do not enable this feature, an item can be assigned to exactly one category. In this case, an item can be assigned to only one default display category.

10. Save and close the form.

5.8.4.4 Associating Product Group Category Set to Products

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, select the Inventory responsibility. Navigate to Setup > Items > Categories > Category Sets. Select the appropriate organization. The Category Sets form open.

2. Enter a unique name in the Name field and a description in the Description field.

3. From the Flex Structure LOV, select a flexfield structure name.

4. Select a control level from the Controlled At LOV:

   - Master Level: Item assigned to this Category Set has the same category value in all organizations where it is assigned.

   - Org Level: Item assigned to this Category Set may have a different category value in each organization where it is assigned.

5. Using the Default Category LOV, query the Product Group Category Sets by clicking F11 in the form that opens. Execute the query by hitting Control F11 and selecting the default category data. Select the item from the System Items list. Click OK.

6. Click Assign. The Item Assignment window opens.

7. From the Item LOV, query the item by hitting F11 and entering % in the form that opens. Execute the query by hitting Control F11. The Description field will be automatically populated with the predefined description.

8. Using the Category LOV, enter a category by hitting F11 in the form that opens. Execute the query by hitting Control F11.

9. Click Accept.

10. Save, and close the form.

5.8.4.5 Pointing to Product Group Category Sets.

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, navigate to System Administrator > Profile > System. The Find System Profile Values form opens.
2. Using the Profile field LOV, query the profiles by entering *Service%* in the Find field of the Profiles form that opens. Select `Service:Product Default Category Set`, then click Find. The System Profile Values form opens.
3. From the appropriate LOV, select the product group category name.
4. Save, and close the form.

5.9 Setting Up Oracle CRM Foundation

Oracle CRM Foundation includes modules that are shared across CRM applications. These include Tasks, Escalations, Notes, Territories, Resources and Assignment Manager.

Within Oracle Quality Online, Tasks allow project specific activities to be defined and tracked, thus permitting escalation (optional) when required. Notes permit extensive information collection and transfer. Territories, Resources and Assignment Manager allow the creation of general areas of expertise (Territories), specific groups for handling those areas (Resources) and appropriate work assignment (Assignment Manager).

5.9.1 Setting Up Tasks (Optional)

Tasks can be used for escalation, patch, document, or quality assurance requests, and are used to assign work activities to other users. The CRM Task Administrator sets up Tasks in Oracle Forms. Task set up consists of the creation of Task Types, Task Priorities, Task Statuses and Task Contact Type. This information is visible in the LOVs for the respective fields in Oracle Quality Online. To add new Tasks follow the instructions below.

5.9.1.1 Creating Task Types

Task Types are currently global. This means that they are shared across all CRM products.

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, navigate to CRM Task Manager > Setup > Define Task Type. The Task Types window appears.

2. Click in a record in the Task Types list. Click the New record icon, located on the menu bar. In the new record enter the Type in the Type column.
3. Workflow and Rule information is not required for Oracle Quality Online.
4. Enter the Effective Dates if desired.
5. Unit of Measure (UOM) and Duration are optional.
6. Select Task Type flags if desired. They are not required for Oracle Quality Online. Task Type flag definitions:
   - Notification: Launch notification workflow automatically.
   - Schedulable: Reserve the resource via the Scheduler.
   - Billable: Signify a Task as a service that requires billing.
   - Private: Restrict Task availability.
   - Seeded: Lock edit of Task Type from future users.
7. You must save changes before you can Map Types. Save and select the Map Types button. The Mapping Objects form appears.
8. Select *Defects* from the Source Object LOV to map to the defect source code. Then select *Enhancements* from the Source Object LOV. This maps your new type to Oracle Quality Online.
9. Save and close the form.

5.9.1.2 Creating Task Priorities

Task Priorities are mapped to specific CRM applications. If end dates or other parameters are changed this affects Oracle Quality Online.

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, navigate to CRM Task Manager > Setup > Define Task Priority. The Task Priority window appears.
2. Click in the last record in the Priority list. Click the New record icon, located on the menu bar. In the new record enter the Priority in the Priority column.
3. Enter a numerical value in the Importance field that reflects your level of importance for this Task Priority.
4. Enter a description in the Description field.
5. Entering the Effective Dates is optional.

6. You must save changes before you can Map Priorities. From File, click Save and Proceed. Select the Map Types button. The Mapping Objects form appears.
7. From Source Object LOV, select *Defects* to map to the Source Codes.
8. From the Task priority LOV, select the new Task Priority. Repeat Steps 7-8 for Enhancements so that the new Task Priority is mapped to both Defects and Enhancements.
9. Entering End Date and Application is optional.
10. Click Save and then close the form.

5.9.1.3 Defining Task Statuses

Use this procedure to define types of task status for your users.

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, navigate to CRM Task Manager > Setup > Define Task Status. The Task Status window appears.
2. Click in a record in the Status list. Click the New record icon, located on the menu bar. In the new record enter the Status name in the Status column.
3. Enter a description in the Description field.
4. Enter the Effective Dates in the From and To fields. The From date is mandatory.
5. Verify that Task is visible in the Usage field.
6. Select Task Status checkboxes as needed. The Task Status checkbox is required. Task Status flag definitions:
   - Assigned: Assigned to an individual
   - Working: In progress
   - Schedulable: Scheduled or re-schedulable
   - Accepted: Accepted by owner
   - Rejected: Rejected by owner
   - On Hold: Temporarily not active
   - Approved: Approved by management
   - Completed: Completed by owner
   - Canceled: Canceled by owner, creator, or management
   - Delete Allowed: Delete acceptable without cancellation

- Closed: Completed and closed
- Seeded: Pre-defined task status

7. From the menu bar select File > Save and Proceed.

Note: For information on Creating Task Templates, please see the *Oracle CRM Application Foundation Implementation Guide*.

5.9.2 Setting Up Escalations (Optional)

Escalations are currently global across all CRM products. Manual Escalations require Tasks to be set up. Set up affects both Oracle Quality Online and TeleService.

5.9.2.1 Setting up Escalation Reasons

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, navigate to CRM Task Manager > Setup > Define Escalation Reason. The Escalation Reasons Lookups window appears.
2. Click in the last record in the Code list. Click the New record icon, located on the menu bar. In the new record enter a code for the Escalation Reason.
3. Enter a definition for the Code in the Meaning column, and a description for the Code in the Description column. These two fields can match.
4. The Tag field is optional.
5. Enter the Effective Dates. The Effective From Date is mandatory and will automatically default to today’s date. It can be changed from the Effective From Date LOV.
6. Verify that Enabled has been checked.
7. Save, and close the form.

5.9.2.2 Setting up Escalation Levels

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, navigate to CRM Task Manager > Setup > Define Escalation Level. The Escalation Levels Lookups window appears.
2. Click in the last record in the Code list. Click the New record icon, located on the menu bar. In the new record enter a code for the Escalation Level.
3. Enter a definition for the Code in the Meaning column, and a description for the Code in the Description column. These two fields can match.

4. The Tag field is optional.
5. Enter the Effective Dates. The Effective From Date is mandatory and will automatically default to today's date. It can be changed from the Effective From Date LOV.
6. Verify that Enabled has been checked.
7. Save and close the form.

5.9.2.3 Setting up Escalation Status

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, navigate to CRM Task Manager > Setup > Define Escalation Status. The Task Status window appears.
2. Click in the last record in the Status list. Click the New record icon, located on the menu bar. In the new record enter a name for the Escalation Reason. This is the only mandatory entry. The followings steps are suggested.
3. Enter a description in the Description field.
4. Enter the Effective Dates in the From and To fields.
5. Verify that Escalation is visible in the Usage column.
6. Select Escalation Status flag checkboxes as needed (see step 5.9.1.3. for definitions)
7. Save and close the form.

5.9.3 Setting Up Notes

Notes allow the capture of extensive, text based, project information within Oracle CRM applications. In Oracle Quality Online, the Notes are intended to facilitate and speed up the problem solving process by allowing complete information storage and exchange. For Oracle Quality Online, Notes are relevant to Defects, Enhancements, Escalations, and Tasks. CRM Applications come with various predefined Note Types.

To setup new Note Types, and/or disable seeded Note Types, see the Oracle CRM Application Foundation Implementation Guide, Release 11*i*.

5.9.3.1 Mapping Note Types

When you map a note type to a source object, you limit the visible note types for that source to the defined subset of note types. Prerequisite: Setting up Note Types. See the Oracle CRM Application Foundation Implementation Guide, Release 11*i*.

1. Log on to Oracle Forms as sysadmin. In the Responsibility Form select the CRM Administrator responsibility. Navigate to Notes Setup > Source and Note Type Mapping.
2. Using the Source Object LOV, select the appropriate source (Defects, Enhancements, Escalations, or Tasks).
3. Select a Note Type for the Source.
4. Using the Application LOV, select the application.
5. Set an End date, if desired, using the End Date LOV.
6. Save, and close the form.

5.9.4 Setting Up Assignments

Ownership can be auto assigned to individuals or groups based on territory qualifiers. Territories map to the relevant development groups in terms of defect ownership. For example, some development groups own defects for particular products, others own defects for products on specific platforms. The products, platforms, and groups must be associated to the relevant territories as territory qualifiers.

In Oracle Quality Online, Territories typically reflect organizational, not geographical structure.

Please see Appendix C Territory Setup or the Oracle CRM Application Foundation Implementation Guide and Concepts and Procedures, both Release 11i, for more information.

5.9.4.1 Enabling Oracle Quality Online Territory Qualifiers

Qualifiers are the criteria used to delineate a territory.

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, navigate to CRM Administrator > Territory Manager > Territory Administration. From the menu bar, select Administration > Setup Qualifiers. The Setup Qualifier form opens.
2. From the Usage LOV, select Oracle Defect Management.

3. Click the Enabled checkbox in the Status area, then Click the Find button. A list of qualifiers will appear.
4. Enable the Oracle Quality Online qualifiers that you wish to use by clicking on the corresponding checkboxes.
5. Click Update Qualifiers, then close the form.

5.9.4.2 Creating a Territory Type

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, navigate to CRM Administrator > Territory Manager > Territory Administration.
2. Select Territory Types in the View By field.
3. Click on Oracle Defect Management from the tree menu.
4. Click the New record icon, located on the menu bar. The Territory Type form opens.
5. Enter a name and description of the new territory type.
6. Enter Start and End dates.
7. From the Transaction Types LOV, select Defect or Enhancement.
8. Select qualifiers from the LOV in the Transaction Qualifier Name field.
9. Repeat the process until all required qualifiers for the new territory type have been selected.
10. From the menu bar, click Save.

5.9.4.3 Setting up Oracle Quality Online Territories

It is mandatory to set up a catch-all territory as a default. All other territories will be pushed as its children. This ensures default assignment in any circumstances.

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, navigate to CRM Administrator > Territory Manager > Territory Administration.
2. Select Territories from the LOV in the View By field.
3. Click on Oracle Defect Management from the tree menu.
4. Click the New record icon, located on the menu bar. The Territory Details form opens.
5. Enter a name and description of the new territory you wish to define.
6. Select Catch-All from the Parent LOV.

7. Select Defect or Enhancement from the LOV in the Transaction Types field.
8. Set a Ranking number.
9. Enter *1* for the number of winners.
10. Click the Transaction Qualifiers tab.
11. Select a qualifier from the Transaction Qualifier LOV.
12. Select values from the Values Form field.
13. Click the Resource tab.
14. Select Name and Role name. This populates the Access Type fields.
15. Click Save from the menu bar.

5.9.4.4 Generating a Territory Package

After defining territories using Territory Management, you must run the Generate Territory Package concurrent program to compile the territories. If you do not generate the Territory Package, none of your changes will go into effect.

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, navigate to CRM Administrator > Resource Manager > Others > Requests > Run.
2. In the Submit a New Request form, select Single Request.
3. In the Submit Request form, select Generate Territory Package from the listed Reports in the Name field LOV.
4. In the Parameters window, select Oracle Defect Management from the Usage field LOV.
5. Select Defect or Enhancement from the list item in the Qualifier Type field LOV.
6. Select either Yes or No from the Debug flag and SQL Trace field LOVs.
7. Click OK.
8. Back in the Submit Request form, click Submit.
9. Optionally, click the Language, Schedule, and Options buttons to select language (s), submission schedules, and completion options.

Note: You can use the Copy button to take advantage of previously entered request submissions.

5.10 Setting up MES

Please see Section 5.17 Setting up Alerts.

5.11 Setting up Links for Related Documents

The steps below allow users to link related documents to defects and enhancements.

1. Log on to Oracle Forms as sysadmin. Select the CRM Administrator responsibility. Navigate to Task and Escalation Manager > Setup > Objects Meta-data. The Task Setup Object Types form appears.
2. Enter values for the related documents links in at least the four mandatory fields:
   - Name
   - Object Code
   - Name Column
   - ID Column
   - From
3. In the Usage section, Enter *DF_LINK* for defects and *ENH_LINK* for enhancements in the Object User field.
4. Click Save from the menu bar.
5. To verify that this option has been set up:
   a. Log in to the application as a user.
   b. Open up a defect or enhancement.
   c. In the Defect or Enhancement Details page, click Link.
   d. Scroll down to the bottom of the page. The Related Documents section should appear with the object listed in the drop-down.

5.12 Setting up Knowledge Base Submit for Defects

Because Knowledge Base is embedded in Oracle *i*Support, it is necessary that the Oracle Quality Online Administrator also have the *i*Support administrator role and the CS_KB_SYS_ADMIN responsibility. Please see Section 5.6.2 Creating an FND

User and Assigning Responsibilities, and Section 5.6.4 Assigning JTF Roles to Each User.

To link Oracle Quality Online Note Types to Knowledge Base Statement Types:

1. Login to JTF as KM administrator. Navigate to SMS > Setup > Statement Types. The Statement Type page opens.
2. Select the appropriate statement type. The Statement Type details page opens.
3. Under the Related drop down box, select External Links. After page refreshes, click Add. The Select an External Object page appears.
4. Click Note Type link. The Note Type page opens. Click Go for a list of all JTF Note Types.
5. Select the Note Type. Click Update.

In order for the submission to take effect, run the Knowledge Base Sync Indexes concurrent program. Please see Chapter 6, Section 6.6 Concurrent Programs.

5.12.1 Associating/Disassociating a Statement Type to a Solution Type

To associate a statement type to a solution type:

1. Login to JTF as the Knowledge Management administrator.
2. Navigate to SMS > Setup > Solution Types. The Solution Types screen appears with a list of existing Solution Types.
3. Click the Solution Type Number link. The Solution Type screen for the Solution Type Number appears.
4. Click Add/Delete button. The Associate Statement Types screen appears.
5. To add a statement type to the existing solution, choose the desired statement type from the Available Statements Types box and assign (>) it to the Selected Statement Types box.
6. To delete a statement type from the existing solution, choose the desired statement type from the Selected Statement Types box and use the arrow key (<) to move a statement that you want to disassociate to Available Statements Types box.
7. Click Save to save the changes or click Cancel to restore the original values and return to the previous screen.

5.13 Oracle Quality Online Administration

During the implementation of Oracle Quality Online and throughout the application lifespan, the Oracle Quality Online administrator must configure and modify the defect and enhancement management processes, standards, lookups and alerts. Chapter topics include:

- Before You Begin
- Setting up Processes
- Setting up Standards
- Setting up Lookups
- Setting up Alerts
- Setting up the Homepage

5.14 Before You Begin

Please note the following.

5.14.1 Understanding Sort Order

- Seeded data comes in a default sort order. Removing, adding, or changing sort order indicators will cause the resulting drop down list to present the items with assigned sort order first. Those items- custom or seeded- without a sort order indicated will be listed in ASCII alphabetical order based on the Name field.
- All custom entry Names must be unique to allow for the above sort listing.

5.14.2 Understanding Start and End Effective Dates

Start and End Effective dates are not mandatory. They can be used to disable seeded data (see below) and for custom settings if desired.

5.14.3 Understanding Seeded Data

- If you disable seeded data, after having used it, but want to allow searches on the earlier information, set an Effective Date in the past for those seeded data items to make it visible in the LOV for searches.
- Changes made to seeded data will not be affected by future patches.

- To disable seeded (or custom) data, set an Effective Date for the value far into the future so that it does not show up in the LOV for searches.

5.15 Setting up Processes

The Oracle Quality Online System Administrator configures the Defect and Enhancement workflow operations through Processes.

5.15.1 Changing Responsibility within Oracle Quality Online

While performing administrative tasks, the Oracle Quality Online Administrator can switch Default Responsibility from within Oracle Quality Online in order to verify setup and/or changes.

1. Navigate to Profile > Preferences.
2. From the Default Responsibility drop down box, select the desired responsibility. Note that you must have a Responsibility for it to appear in the drop down box.
3. Click Update and Sign Out.
4. At the JTF login screen, click Go to log in with your changed Responsibility.

5.15.2 Setting up Category Workflow Options

There are two Categories in Oracle Quality Online, Defects and Enhancements. There is one seeded workflow associated with both Categories. The Oracle Quality Online System Administrator assigns workflow parameters by category.

1. Log in to the JTF login page as the Oracle Quality Online Administrator.
2. Navigate to Process > Categories.
3. The seeded workflow NOTIFICATION_EMAIL is visible in the drop-down boxes associated with the Categories, Defect and Enhancement.
4. To automatically launch the workflow when a defect or enhancement is created, check Auto Launch Workflow for the desired category.
5. To end workflow when the defect or enhancement is closed, check Abort Workflow on Close.
6. Click Update to set the new values, or Restore to return to the previous values.

5.15.3 Associating Types with Categories

Both defects and enhancements must be associated with Types. Types serve to classify the nature of the defect or enhancement and are useful for reporting purposes, template creation, and listing phases. They allow high level understanding of the kinds of problems users are experiencing and the changes they want in future releases. To avoid confusing users, it is recommended that you share phases for as many Types as possible.

Seeded Defect Types include:

- Data Corruption
- Documentation
- Installation

Note: For a complete list of Seeded Data, see Appendix B Seeded Data.

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Process > Categories.
2. Click the Types link in the Associate column. A list of all Types will be visible.
3. To add a new Type enter a Name in the Name Field. Selecting a Sort Order will determine the placement of the new Type in the drop-down list.
4. Enter a Description in the Description Field.
5. You may set Start and End Dates if desired.
6. Check Base Defect Required if necessary.
7. If you need to clear the row for any reason click the eraser icon.
8. Click Update to set the new values, or Restore to return to the previous values. You cannot delete a type once it is created.
9. To add additional rows click the More Rows link or the down arrow.

Note: For a complete list of Seeded Data, see Appendix B Seeded Data.

5.15.4 Setting up Phases

Configurable phases are intended to reflect the high level business process steps for handling defects and enhancements and tracking progress from one stage to another. If desired, changing the phase can trigger assignment to the team or individual responsible for the next phase. Seeded Phases include:

- Definition
- Resolution
- Customer Verification

Note: Phases should be kept to a minimum and reflect the actual processes involved in resolving defects and enhancements.

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Process > Phases. A list of all Phases will be visible.
2. To add a new Phase, enter a name in the Name Field.
3. Enter a description for the Phase in the Description field.
4. Select an option from the Phase Status Options column drop-down box.
5. You may set Start and End Dates if desired.
6. If you need to clear the row for any reason click the eraser icon.
7. Click Update to set the new values, or Restore to return to the previous values. You cannot delete a Phase once it is created.
8. To add additional rows click the More Rows link or the down arrow.

5.15.5 Setting up Phase Statuses

Phase Statuses provide detailed Phase information. Phase Status should contain meaningful information about the associated Phase. The relationship between Phase and Phase Status determines the valid defect statuses - open or closed. This allows you to enforce the capture resolution information.

Seeded Defect Phase Statuses include:

- Awaiting Dependent Fix
- Could not Reproduce
- Defect Resolved

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Process > Phases > Phase Statuses. A list of all Phase Statuses is visible.
2. To add a Phase Status, enter a name in the Name field (e.g. Defect Resolved).
3. Enter a description in the Description field.

4. Check Base Defect Required and/or Fix Details Required if needed for this Phase Status.
5. If the Phase Status is equivalent to Resolved, check the Resolved checkbox.
6. You may set Start and End Dates if desired.
7. If you need to clear the row for any reason click the eraser icon.
8. Click Update to set the new values, or Restore to return to the previous values. You cannot delete a Phase Status once it is updated.
9. To add additional rows click the More Rows link or the down arrow.

Note: For a complete list of Seeded Data, see Appendix B Seeded Data.

5.15.6 Associating Phase Status with Existing Phase

After a Phase Status is created, it can then be associated with a Phase.

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Process > Phases. A list of all Phases will be visible.
2. Click the Phase Status link in the Associated column for the Phase needing the association.
3. From the Phase Status column select a status from the drop-down list. Select a sort order if desired.
4. If you want the status to be Viewable While Open, or Viewable While Closed, check the relevant boxes.
5. You may set Start and End Dates if desired.
6. If you need to clear the row for any reason click the eraser icon.
7. Click Update to set the new values, or Restore to return to the previous values. You cannot delete a Phase Status once it has been created.
8. To add additional rows click the More Rows link or the down arrow.

5.15.7 Associating Phases with Types

Types serve to classify the nature of the defect or enhancement. Types can be associated with a unique set of phases.

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Process > Categories.

2. Click the Types link in the Associate column for a Category. A list of the Category Types will be visible.
3. Select a Type from the list by clicking on the Phases link in the Associate column.
4. Select a Phase from the Phase Name column drop-down list. Select a Sort Order if desired.
5. Check Primary Contact Owns Phase if you want the primary contact to be phase owner. Otherwise Assignment Manager will assign owner based on defect attributes.
6. To set any phase as the default, check Default Phase.
7. You may set Start and End Dates if desired.
8. If you need to clear the row for any reason click the eraser icon.
9. Click Update to set the new values, or Restore to return to the previous values. You cannot delete an association once it has been entered.
10. To add additional rows click the More Rows link or the down arrow.

Note: For a complete list of Seeded Data, see Appendix B Seeded Data.

5.16 Setting up Standards

The Oracle Quality Online Administrator sets up and manages Templates, Resolution Times, and Note Token Rules.

- Templates are set up to ensure that users provide required information when creating defects and enhancements.
  - Template Usage allows the administrator to designate where the template is enforced.
  - Template Prompts, which may be product specific, improve defect and enhancement information gathering. The administrator creates text prompts to appear in the template and sets a sort order if needed.
- Resolution Times are set for defects based on internal product priorities and severity levels.
- Setting Note Token Rules allows you to define parsing rules and destinations for hyperlinking keywords in the Note Details display.

5.16.1 Creating Templates

Templates assist users in creating well-formed defects.

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Standards > Templates. A list of Templates will be visible.
2. To create a new Template, enter a name in the Name field.
3. Enter a description in the Description field.
4. You may set Start and End Dates if desired.
5. If you need to clear the row for any reason click the eraser icon.
6. Click Update to set the new values, or Restore to return to the previous values.
7. Once a Template has been created, edits to Usage and Prompts can be made. You cannot delete a Template once it has been created, but you can inactivate it by end-dating.
8. To add additional rows click the More Rows link or the down arrow.

5.16.2 Setting Template Usages

1. Navigate to Standards > Templates. A list of Templates will be visible.
2. Click the Usages link in the Edit column for the Template. The Template Usages page will be visible.
3. Select either Defect or Enhancement from the Category drop-down list. If you want the template applicable to the selected category only, proceed to step 8.
4. To associate the category specific template with a Type, select from the Type drop-down list. If you want the template applicable to the selected category and type only, proceed to step 8.
5. To associate the template with a specific product, click Go in the Product Name column. A product number and description LOV will be visible.
6. Select the product by clicking on the link in the Number column. This populates the Number and Description fields in the Product Name column.
7. You may clear the row before updating by clicking on the eraser icon.
8. Click Update to set the new values, or Restore to return to the previous values.
9. To remove an entry, check the Remove column.

5.16.3 Setting up Template Prompts

Template prompts should be consistent across Products and Types, targeted and useful as all users must respond to the mandatory questions.

A non-mandatory prompt can be added to the end of all Templates with an indication that it be used for critical severity defects only. Template prompt and response combined cannot exceed 2000 characters.

You may wish to devise a visual format for entering prompts so as to distinguish between questions and answers. For example: *1. Question One, 2. Question Two,* or *Q1, Q2*.

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Standards > Templates.
2. Click the Prompts link in the Edit column for the Template. The Template Prompts page will be visible.
3. Enter your prompt text in the Prompt field. Select a Sort Order if desired.
4. In the Response Type column, select a text line variable, or the Yes / No Question option from the drop-down box.
5. Check Response Required if a response is mandatory.
6. Check More Information Allowed if you want to provide users with the option of being able to add additional information.
7. You may clear the row before updating by clicking on the eraser icon.
8. Click Update to set the new values, or Restore to return to the previous values.
9. To remove an entry, check in the Remove column.

5.16.4 Setting Process Resolution Time

Setting Resolution Times allows the organization to define the levels of service required to complete the defect lifecycle.

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Standards > Resolution Times.
2. Click Go next to the Number field in the Product column. A product number and description LOV will be visible
3. Select the product by clicking on the link in the Number column. This populates the Number and Description fields in the Product column.

4. In the Severity column, select a Severity from the drop-down list.
5. In the Resolution column, select a desired increment in the Time field, then set a desired Unit of Measure (UOM).
6. Repeat the above step in the Closure column.
7. You may set Start and End Dates if desired.
8. Click Update to set the new values, or Restore to return to the previous values.
9. To add additional rows click the More Rows link or the down arrow.

5.16.5 Setting Note Token Rules

Setting Note Token Rules allows you to define parsing rules and destinations for hyperlinking keywords in the Note Details display.

To set Note Token Rules:

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Standards > Note Token Rules.
2. Click Create Note Token Rule.
3. Enter a unique Sequence number in the Sequence text field. It does not have to be consecutive. Sequences prioritize the rules that set token precedence.
4. Enter a description in the Description text field.
5. Set Start and End Dates, if desired, using the Calendar icon tool.
6. In the Token section, enter the keyword to hyperlink in the Value field. (a name for the linked text, e.g. *Bug*, *http://*, etc.).
7. Set Preceding and Following Characters. The Preceding Delimiting Characters distinguish your token value from identical text values, and the Following Delimiting Characters determine where the hyperlink stops. For instance, if your bug link always begins after a colon and must end with a period, your Preceding Delimiting Character is a colon and your Following Delimiting Character is a period.
8. Check the appropriate checkboxes for the characters. These distinguish the Token and/or the Parameter from the rest of the text. For example, if you have a token *bug* with the Preceding Delimiting Characters Space checked, then a note with the word *debug* in it will not be hyperlinked because the word *bug* is not preceeded by a space.

9. In the Parameter section, use the Type drop-down box to select a Parameter type.
10. Enter the Following Delimiting Characters for the parameter, if desired, and / or check the appropriate delimiting checkboxes. If No Parameter is selected, then the Following Characters, Minimum Length, and Maximum Length options are not allowed.
11. Enter your minimum and maximum length parameters.
12. In the Destination section, select a Type using the drop-down box. If your type is Function, select a User Function Name using the LOV. If your type is URL, enter the base url in the Base URL text field.
13. Click Create.

5.17 Setting up Lookups

The Oracle Quality Online Administrator can configure site specific content for drop-down lists (lookups). Topics include :

- Setting Priorities
- Setting Severities
- Setting Languages
- Tracking Groups
- Setting Environment Variables
- Miscellaneous Lookups

5.17.1 Setting Priorities

Priorities allow identification and tracking of defect and enhancement significance based on internal priorities. To add to the seeded priorities:

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Lookups > Priorities. A list of the seeded Priorities appears
2. To add a new Priority, enter a name in the Name Field.
3. Select a Sort Order if desired.
4. Enter a description in the Description field.
5. You may clear the row before updating by clicking on the eraser icon.

6. You may set Start and End Dates if desired.
7. Click Update to set the new values, or Restore to return to the previous values.
8. To add additional rows click the More Rows link or the down arrow.

5.17.2 Setting Severities

Severities are configurable codes that describe the seriousness of a Defect. In Enhancements, Severity equals Desirability. Severities are external standards chosen by users, as opposed to Priorities which are internally set. To add to the seeded Severities:

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Lookups > Severities.
2. Enter a name in the Name field.
3. Select a Sort Order if desired.
4. Enter a description in the Description field.
5. Select either Defect or Enhancement from the Category column drop-down list.
6. You may clear the row before updating by clicking on the eraser icon.
7. You may set Start and End Dates if desired.
8. Click Update to set the new values, or Restore to return to the previous values.
9. To add additional rows click the More Rows link or the down arrow

5.17.3 Setting Languages

Defects and Enhancements can be logged for products available in multiple languages. To add a product language:

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Lookups > Languages.
2. Enter the Language name in the Name field.
3. Select a Sort Order if desired.
4. Enter a description for the Language in the Description field.
5. Select the language in the Oracle Application Language drop-down list.
6. You may clear the row before updating by clicking on the eraser icon.

7. You may set Start and End Dates if desired.
8. Click Update to set the new values, or Restore to return to the previous values.
9. To add additional rows click the More Rows link or the down arrow.

Note: For all languages, enter All Languages in the Name and Description fields. Leave Oracle Application Language field blank.

5.17.4 Tracking Groups

Tracking Groups allow development organizations to track particular defects. They can be used for targeted searches, and for special reporting requirements. Tracking groups are particularly useful for reporting requirements that do not cross an entire organization or are group specific.

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Lookups > Tracking Groups.
2. Enter a name for the Tracking Group in the Name field.
3. Select a Sort Order if desired.
4. Enter a description for the Tracking Group in the Description field.
5. You may set Start and End Dates if desired.
6. Click Update to set the new values, or Restore to return to the previous values.
7. To add additional rows click the More Rows link or the down arrow.

5.17.5 Setting Environment Variables

Environment Variables are used for tracking additional environment information such as database version, browser version, etc. To set up your specific Environment Variables:

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Lookup > Environment Variables.
2. Enter a name in the Name field.
3. Select a Sort Order if desired.
4. Enter a description for the Environment Variable in the Description field.
5. You may set Start and End Dates if desired.
6. Click Update to set the new values, or Restore to return to the previous values.

7. To add additional rows click the More Rows link or the down arrow.

5.17.6 Miscellaneous Lookups

5.17.6.1 Setting Reproducibility

Oracle Quality Online allows you to configure lists for determining how frequently a Defect can be reproduced.

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Lookups > Miscellaneous.
2. Select Reproducibility from the Attribute drop-down list. Click Go.
3. Enter a term for the Code in the Code field.
4. Enter a Meaning, in the Meaning field.
5. Optionally, enter a Description in the Description field.
6. You may set Start and End Dates if desired.
7. Click Update to set the new values, or Restore to return to the previous values.
8. To add additional rows click the More Rows link or the down arrow.

5.17.6.2 Setting Lifecycle

In Oracle Quality Online, the product lifecycle stages are used with product versions to further refine the defect definition. Seeded Lifecycle stages are Alpha, Beta, Development, and Production. They appear in the Product Status drop down list in Defect Details.

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Lookups > Miscellaneous.
2. Select Lifecycle from the Attribute drop-down list. Click Go.
3. Enter a term for the Code in the Code field.
4. Enter a Meaning, in the Meaning field.
5. Optionally, enter a Description in the Description field.
6. You may set Start and End Dates if desired.
7. Click Update to set the new values, or Restore to return to the previous values.
8. To add additional rows click the More Rows link or the down arrow.

5.17.6.3 Setting Source Modification Types

This step allows you to set Lookups for types of modifications. For example, Code, User Interface, or Documentation modifications.

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Lookups > Miscellaneous
2. Select Source Modification Types from the Attribute drop-down list. Click Go.
3. Enter a term for the Code in the Code field.
4. Enter a Meaning, in the Meaning field.
5. Optionally, enter a Description in the Description field.
6. You may set Start and End Dates if desired.
7. Click Update to set the new values, or Restore to return to the previous values.
8. To add additional rows click the More Rows link or the down arrow.

5.17.6.4 Setting Link Type

Defects and Enhancements can be related and linked. Link Types in Oracle Quality Online reflect relationships between objects. They are configurable and allow relationship definitions to include dependencies. This step allows you to define those relationships and links.

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Lookups > Miscellaneous.
2. Select Link Types from the Attribute drop-down list. Click Go.
3. Enter a term for the Code in the Code field.
4. Enter a Meaning, in the Meaning field.
5. Optionally, enter a Description in the Description field.
6. You may set Start and End Dates if desired.
7. Click Update to set the new values, or Restore to return to the previous values.
8. To add additional rows click the More Rows link or the down arrow.

5.18 Setting up Alerts

Alerts are short messages from the system administrator reporting scheduled outages or system issues. The Alerts bin is viewable from the Homepage. The

Oracle Quality Online Administrator must be imported as a Resource with the MES Administrator Resource role assigned in order to create categories or groups, publish messages, and approve publishing items to a particular group.

Topics include:

- Creating Groups
- Sending Alerts

5.18.1 Creating Groups

In order for Alerts to work, it is necessary to create and manage groups. *Group is* the relevant link on the Alert Administration page. Groups are used to distribute content to users, and to classify content in the repository.

To create new groups:

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Alerts > Alert Administration. Click Group from the Access and Managers bullet list. The Group Manager page appears.
2. Enter a name in the Group Name column.
3. Check the Administrator, Publish Content, and Approval checkboxes.
4. Assign the group to the profile, DEMS: Channel for System Alerts. This allows all users to receive alerts
5. Click Update.

5.18.2 Sending Alerts

To send Alerts:

1. Log in to the JTF login page as the Oracle Quality Online Administrator. Navigate to Alerts > Send Alert. The Publish page will be visible.
2. From the Select an Item Type drop-down box, select Message.
3. Enter a title for the Alert in the Title field, then enter the author name in the Authors name field.
4. Enter the message text in the Message field.
5. Enter the effective start date for the message.
6. Select either the Permanent radio button if the Alert is to be displayed indefinitely, or the Duration radio button if you want it to display for only a set

time. If selecting the Duration radio button, set duration values with the drop-down boxes.

7. Select a priority from the Priority drop-down list.
8. From the Available column in the Groups section, select the group and click Assign (>) to move your selection over to the Selected column.
9. Click Publish to Publish the Alert, or Clear to set the new values.

5.18.3 Other Administrative Tasks

Frequently recurring tasks for the Oracle Quality Online Administrator include the following:

5.18.3.1 Finding a Platform

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, select the Manufacturing and Distribution Manager responsibility. Navigate to Inventory > Items > Item Search. Select the appropriate organization. The Find Items form opens.
2. Select Item Categories from the Show LOV.
3. In the Category Set LOV, select the appropriate platform Category Set. In the Category LOV select the appropriate category.
4. In the Platform Group query form, enter % and your search delimiters. Execute the query using Control F11. Select from the resulting list.
5. Click Find. Note the item number or description.

5.18.3.2 Editing a Platform

1. Log on to Oracle Forms as sysadmin. In the Responsibility window, select the Manufacturing and Distribution Manager responsibility. Navigate to Inventory > Items > Master Items. Select the appropriate organization.
2. Select the Find icon on the menu bar to display the Find Master Items form. Enter the item number
3. Edit the Platform record as needed.
4. From File, select Save and Proceed.

5.19 Setting up the Homepage

The Homepage is the landing page in Oracle Quality Online. It provides an overview of assigned and unassigned work, alerts and system information, and quick navigation to other key areas of the application.

All Oracle Quality Online users must set up their Homepage options.

5.19.1 Personalizing Homepage Content Options

Users can choose what Key Defect and/or Enhancement Summary Views will appear on their Homepage.

1. Select Profile and navigate to DEMS Profile > Home.
2. Select Defect and Enhancement Key Summary views using the checkboxes.
3. Click Update to set the new values or Restore to return to the previous values.

5.19.2 Setting Defects Page Options

5.19.2.1 Customizing Note Details Display

To customize your Note Details displays on the Defect Details page:

1. Navigate to Profile > DEMS Profile > Defects.
2. Select a display option from the Show As Default LOV in the Details section. This determines the level of Note Details displayed in the Details section of a defect.
3. Click Update or Restore.

5.19.2.2 Customizing Defect Summary Views

1. Select Profile and navigate to DEMS Profile > Defects.
2. From the Show As Default drop down box select your Defects default display option for the Defects page. The seeded values are Open Defects I Own, Defects with Open Tasks I Own, and Defects with Open Escalations I own.
3. In the View Name table, enable the seeded and/or custom Defect Summary Views options as desired. If you have entered custom Summary Views, you may remove them using the appropriate column. Select Update or Restore after you make any changes.

4. To add custom Defect Summary Views, click New Search. Input your criteria and select Search. Apply Summary Display Options if desired. Name your search in the Save Search As section. To save the resulting search as a Defect Summary View, Click Save and Apply Search. To save as the Summary Default View, select checkbox.

5.19.2.3 Setting Defect Quick Creates Defaults

To set a Quick Create default display for the Defects page:

1. Select Profile and navigate to DEMS Profile > Defects.
2. Using the Show As Default drop down box in the Quick Creates section, select the Quick Create to display as default on the Defects page.
3. To remove Quick Creates check the Remove checkbox.
4. To create new Quick Create viewing options click New Create to access the Create Page. After setting new Quick Create parameters, select Create to save the selection, Restore to return to the previous values, or Back to return to the Defects page.
5. Click Update or Restore if you have made changes.

5.19.3 Setting Enhancements Page Options

5.19.3.1 Customizing Enhancement Note Details Display

To customize your Note Details displays on the Enhancement Details page:

1. Navigate to Profile > DEMS Profile > Enhancements.
2. Select a display option from the Show As Default LOV in the Details section. This determines the level of Note Details displayed in the Details section of an enhancement.
3. Click Update or Restore.

5.19.3.2 Customizing Enhancement Summary Views

1. Select Profile and navigate to DEMS Profile > Enhancements.
2. From the Show As Default drop down box select your Enhancements default display option for the Enhancements page. The seeded values are Open Enhancements I Own and Defects with Open Enhancements I Own.

3. In the View Name table, enable the seeded and/or custom Enhancement Summary Views options as desired. If you have entered custom Summary Views, you may remove them using the appropriate checkbox. Select Update or Restore if you have made any changes.
4. To add custom Enhancement Summary Views, click New Search. Input your criteria and select Search. Apply Summary Display Options if desired. Name your search in the Save Search As section. To save the resulting search as a Defect Summary View, Click Save and Apply Search. To save as the Summary Default View, select checkbox.

5.19.3.3 Setting Enhancement Quick Creates Defaults

To set a Quick Create default display for the Enhancements page:

1. Select Profile and navigate to DEMS Profile > Enhancements.
2. Using the Show As Default drop down box in the Quick Creates section, select the Quick Create to display as default on the Enhancements page.
3. To remove Quick Creates check the Remove checkbox.
4. To create new Quick Create viewing options click New Create to access the Create Page. After setting new Quick Create parameters, select Create to save the selection, Restore to return to the previous values, or Back to return to the Defects page.
5. Click Update or Restore if you have made changes.

6

Profile Options and Concurrent Programs

This chapter discusses system profile options and setups, and concurrent programs. Topics include:

- Before you Begin
- Setting Profile Options Overview
- Setting Oracle Quality Online System Profile Values
- Setting Other Profile Values
- Oracle Quality Online Profile and Internal Names
- Concurrent Programs

6.1 Before you Begin

Before making Oracle Forms settings, verify that Oracle Application is up and running. Because some setup steps require running concurrent programs, you must ensure that the Concurrent Managers are running. Consult your Applications System Administrator for additional information.

6.2 Setting Profile Options Overview

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

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

- Site - Option settings pertain to all users at an installation site; has the lowest priority.
- Application - Option settings pertain to all users of any responsibility associated with the application; has the next-to-lowest priority.
- Responsibility - Option settings pertain to all users currently signed on under the responsibility; has the second-highest priority.
- User - Option settings pertain to an individual user, identified by application username; has the highest priority.

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

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

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

6.3 Setting Oracle Quality Online System Profile Values

To set Oracle Quality Online System Profile Values for the site:

1. Log into Oracle Forms as sysadmin. From the Responsibilities menu, navigate to System Administrator >Profile > System.
2. In the Find System Profile Values form, check *Site*. Enter `DEMS%` in the Profile text box and hit Return or click Find. The System Profile Values form lists the default values for the following:
    1. *DEMS: Advanced Search Fetch Size (Rows)*: Specifies the number of rows the Advanced Search Query will return at any one time. **Valid Values**: an integer that divides evenly into Advanced Search Maximum rows.
    2. *DEMS: Advanced SearchKeep Results (Minutes)*: Specifies the number of minutes to keep previously cached query results for users. **Valid Values**: an integer

3. *DEMS: Advanced Search Maximum number of Criteria*: Specifies the maximum number of search criteria for an Advanced Search. **Valid Values:** an integer greater than Minimum number of Criteria.
4. *DEMS: Advanced Search Max Returned Size (Rows)*: Specifies the maximum number of rows the Advanced Search query is allowed to return. **Valid Values:** An integer.
5. *DEMS: Advanced Search Minimum number of Criteria*: Specifies the minimum number of search criteria for an Advanced Search. **Valid Values:** an integer, less than Maximum number of Criteria.
6. *DEMS: Defect Default Note Type*: Specifies default Note Type for defect creation.
7. *DEMS: Enhancement Default Note Type*: Specifies default Note Type for enhancement creation.
8. *DEMS: Override Revision Control Flag of Component:* Specifies whether Revision Control Flag of Component will be used to validate Component Revision. If set to *No*, Revision will NOT be stored in DEMS tables locally and user must either select from the valid version LOV or if there is no LOV no version can be entered. If set to *Yes*, Revision will be stored in DEMS tables locally and user can enter free format data.

Note: Data migration will be required if this is changed once there are Defects and/or Enhancements in the system.

9. *DEMS: Override Revision Control Flag of Platform*: Profile to indicate whether Revision Control Flag of Platform will be used to validate Platform Revision or not. If set to *No*, Revision will NOT be stored in DEMS tables locally and user must either select from the valid version LOV or if there is no LOV no version can be entered. If set to *Yes*, Revision will be stored in DEMS tables locally and user can enter free format data.

Note: Data migration will be required if this is changed once there are Defects and/or Enhancements in the system.

10. *DEMS: Override Revision Control Flag of Product*:Profile to indicate whether Revision Control Flag of Product will be used to validate Product Revision or not. If set to *No*, Revision will NOT be stored in DEMS tables locally and user must either select from the valid version LOV or if there is no LOV no version can be entered. If set to *Yes*, Revision will be stored in DEMS tables locally and user can enter free format data.

Note: Data migration will be required if this is changed once there are Defects and/or Enhancements in the system.

11. *DEMS: Override Revision Control Flag of Subcomponent:* Profile to indicate whether Revision Control Flag of Subcomponent will be used to validate Subcomponent Revision or not. If set to *No*, Revision will NOT be stored in DEMS tables locally and user must either select from the valid version LOV or if there is no LOV no version can be entered. If set to *Yes*, Revision will be stored in DEMS tables locally and user can enter free format data.

Note: Data migration will be required if this is changed once there are Defects and/or Enhancements in the system.

12. *DEMS: Platform Required for Defect*: This Profile indicates whether or not a Platform is required for Defect creation. If set to *Yes*, a Platform is required. If set to *No*, a Platform is required only if the Platform Specific Flag is checked.

Note: Data migration will be required if this is changed once there are Defects and/or Enhancements in the system.

13. *DEMS: Severity for Defect Alert:* If the Defect is logged, or moved to this Severity an Alert will be sent to the assignee.
14. *DEMS: Time Unit of Measure Class*: Profile to indicate Unit of Measure Class for the Resolution and Closure Time UOM. Base UOM for this Class must be equivalent to one hour.
15. *DEMS: Channel for System Alerts on Homepage:* Specifies the MES channel for system alerts for the Homepage. **Valid Values:** any active and public regular group.
16. *DEMS: Note More Information Allowed:* Provides user with the ability to enter additional information into Note CLOB.
17. *DEMS: Note Summary Size for Note Summarized View:* Specifies the number of characters allowed in the Notes Summary View.

6.4 Setting Other Profile Values

There are additional profile values that must be set for Oracle Quality Online to function correctly.

1. *Service: Default Platform Category Set:* All the items assigned to this Category Set will be identified as Platforms.
2. *Service: Default Category Set*: All the Categories of this Category Set will be used for the purpose of executive reporting.

3. *Service: Inventory Validation Organization*: Maps Inventory/Product Organization.

6.4.1 Setting JTF Application-Level Profile Options

First you must set application-level profile options:

1. Log on to Oracle Forms as sysadmin by using the link provided by your System Administrator: http://<hostname>:<Port_number>/dev60cgi/f60cgi.
2. Select the System Administrator Responsibility.
3. Navigate to Profile > System. The Find System Profile Values form opens.
4. Check Application only, uncheck Site if necessary and enter *Support*.
5. In the Profile field, enter JTF_PROFILE%, and select Find.
6. Verify and/or set the following JTF profile option at application level for Oracle Support:
   - JTF_PROFILE_DEFAULT_APPLICATION - This is the default application ID. Set it to 514.
7. On the same screen, verify and/or set the following profile option at application level for Oracle Support:

JTF_PROFILE_DEFAULT_RESPONSIBILITY - This is the default user responsibility ID and determines the menu structure the user sees when logging onto the HTML tech stack.

To determine the Responsibility ID:

1. Log on to Oracle Forms by opening http://<host>:<web port>/, then selecting Apps Logon Links > VIS Logon through the Forms cartridge (UNIX).
2. Log on as sysadmin.
3. Select the System Administrator Responsibility.
4. Navigate to Security > Responsibility > Define
5. Enter query mode by selecting F11. Enter *DEMS User* in the Responsibility field. Select Control F11 to execute query.
6. From the main menu, go to Help > Diagnostics > Examine. The Enable Diagnostics window opens. Enter password assigned to you.
7. From the *Field* LOV, choose RESPONSIBILITY_ID.

Note the value of the Value Field.

6.4.2 Setting up the Service Profile Options

Use the following steps to set the Service profile options.

1. Log into Oracle Forms as sysadmin. From the Responsibilities menu, navigate to System Administrator > Profile > System.
2. In the Find System Profile Values form, check the Site and Profiles with No Values Boxes *only*. Enter `Service%` in the Profile text box and hit Return.
   - To map your Inventory / Product Organization: In the Profile column locate Service: Inventory Validation Organization. Enter the name of your Inventory / Product organization in the Site column.
   - To facilitate executive reporting: In the Profile column locate Service: Default Category Set.
   - To identify assigned items as Platforms: In the Profile column locate Service: Default Platform Category Set.
3. Click diskette icon in menu bar to save. Close form.

6.5 Oracle Quality Online Profile and Internal Names

The table below lists Profile names and the corresponding internal names.

Profile Name	Internal Name
DEMS: Advanced Search - Fetch Size (Rows	CSS_DEF_ADV_SEARCH_FETCH_SIZE
DEMS: Advanced Search - Keep Results (Minutes)	CSS_DEF_ADV_SEARCH_CACHE_TIME_LIMIT
DEMS: Advanced Search - Max Number of Criteria	CSS_DEF_ADV_SEARCH_MAX_FILTERS
DEMS: Advanced Search - Max Returned Size (Rows	CSS_DEF_ADV_SEARCH_MAX_ROWS
DEMS: Advanced Search - Min Number of Criteria	CSS_DEF_ADV_SEARCH_MIN_FILTERS
DEMS: Defect Default Note Type	CSS_DEF_DEFAULT_NOTE_TYPE
DEMS: Note More Information Allowed	CSS_DEF_NOTE_MORE_INFO_ENABLED

Profile Name	Internal Name
DEMS: Note Summary Size for Note Summarized View	CSS_DEF_NOTE_SUMMARY_SIZE
DEMS: Enhancement Default Note Type	CSS_ENH_DEFAULT_NOTE_TYPE
DEMS: Override Revision Control Flag of Component	CSS_DEF_COMP_REV_VALDN_RULE
DEMS: Override Revision Control Flag of Platform	CSS_DEF_PLAT_REV_VALDN_RULE
DEMS: Override Revision Control Flag of Product	CSS_DEF_PROD_REV_VALDN_RULE
DEMS: Override Revision Control Flag of Subcomponent	CSS_DEF_SUBCOMP_REV_VALDN_RULE
Service: Default Platform Category Set	CS_SR_PLATFORM_CATEGORY_SET
DEMS: Platform Required for Defect	CSS_DEF_PLATFORM_REQUIRED
DEMS: Product Certification Category Set	CSS_DEF_PROD_CERTN_CAT_SET
Service: Default Category Set	CS_SR_PRODUCT_CATEGORY_SET
DEMS: Channel for System Alerts on Homepage	CSS_DEF_SYSTEM_ALERT_CHANNEL
DEMS: Severity for Defect Alert	CSS_DEF_DEFAULT_SEVERITY1_ID
DEMS: Time Unit of Measure Class	CSS_DEF_UOM_CLASS
Service: Inventory Validation Organization	CS_INV_VALIDATION_ORG

6.6 Concurrent Programs

Oracle Quality Online requires that you run specific Concurrent Programs in order to update data when it is modified. These can be run from Oracle Forms in the System Administrator responsibility at the Requests node or in the relevant administration responsibility for the application being updated.

The table below lists the concurrent programs for DEMS and their descriptions.

Program Name	Description
Generate Territory Packages	Changes to Territories will not take effect until this request has been run. **Warning:** Running this request will re-create a database package used in all defect creates and updates. Avoid scheduling this during peak hours.
Synchronize Employee	Changes to Human Resources will not be affected in Resources until this request has been run.
Notification Mailer	Enables workflow email notification. To set parameters, you must know the location of the configuration file on the environment where you will start the workflow notification mailer.
DEMS InterMedia Index Optimization	Performs an interMedia OPTIMIZE on CSS_DEF_DEFECT_TL_C1 index.
DEMS InterMedia Index Synchronization	Performs an interMedia SYNC on CSS_DEF_DEFECT_TL_C1 index.
Knowledge Base Sync Indexes	Updates Knowledge Base with defects submitted from DEMS. Must be run before defects can be searched for in Knowledge Base.

A

Appendix A User Permissions

This Appendix provides detailed information about the Oracle Quality Online User Permissions.

A.1 User Permissions

A.1.1 User Role to Permission Mapping

The following tables summarize Oracle Quality Online Role to Permission Mapping.

A.1.1.1 DEMS Administrator

Note that the DEMS administrator should have all available DEMS roles. The table below lists only those roles and permissions specific to Oracle Quality Online administrative tasks.

The following table lists the Roles and Permissions for the DEMS Administrator

Role/Description	Permission/Description
CSS_DEF_ADMIN DEMS Administration	CSS_DEF_ADMIN_ENV_VARIABLE_MODIFY *View/Create/Update Environment Variables* CSS_DEF_ADMIN_TRACKING_GROUP_MODIFY *View/Create/Update Tracking Groups* CSS_DEF_ADMIN_PROCESS_MODIFY *View/Create/Update Processes* CSS_DEF_ADMIN_LOOKUP_MODIFY *View/Create/Update Lookups* CSS_DEF_RESOLUTION_MODIFY *View/Create/Update Response Times* CSS_DEF_TEMPLATE_MODIFY *View/Create/Update Templates* CSS_DEF_LOV_VIEW *View List of Values*
CSS_DEF_DEFECT_MASS_ UPDATE_ADMIN Admin Defect Mass Update	CSS_DEF_DEFECT_MASSUPDATE_ADMIN *Perform Mass Update Defects*
CSS_DEF_ENH_MASS_UPDATE_ ADMIN *Admin Enhancement Mass Update*	CSS_DEF_ENH_MASSUPDATE_ADMIN *Perform Mass Update Defects*
CSS_DEF_NOTE_TOKEN_ SUMMARY	CSS_DEF_NOTE_TOKEN_SUMMARY *Note Token Rule Summary*
CSS_DEF_NOTE_TOKEN_ MODIFY	CSS_DEF_NOTE_TOKEN_MODIFY *Note Token Rule Setup*

A.1.1.2 DEMS User

The following table lists the Roles and Permissions for the DEMS User.

Role/Description	Permission/Description
Defects:	
CSS_DEF_DEFECT_MODIFY_USER	CSS_DEF_DEFECT_ADD
Comprehensive User Defect Handling	*Create Defect*
	CSS_DEF_DEFECT_MODIFY
	View/Update Defect
	CSS_DEF_DEFECT_NOTE_READONLY
	View Defect Note
	CSS_DEF_DEFECT_ATTACH_MODIFY
	Download/Upload Defect Attachments
	CSS_DEF_DEFECT_CUST_PREVIEW_VIEW
	View Customer View of a Defect
	CSS_DEF_DEFECT_PRINT_PREVIEW_VIEW
	Printer Friendly Format of Defect Detail
	CSS_DEF_DEFECT_ESC_MODIFY
	View/Search/Edit/Create Escalation
	CSS_DEF_DEFECT_REPORT
	View/Update/Create Defect Reports
	CSS_DEF_DEFECT_SERVICE_REQUEST_VIEW
	View Defect Related Service Requests
	CSS_DEF_DEFECT_SOURCE_MODIFY
	View/Search/Create/Edit Source Code
	CSS_DEF_DEFECT_SUMMARYVIEW_VIEW
	View Defect Summary
	CSS_DEF_DEFECT_SUMMARY_PRINT_VIEW
	Print Preview Defect Summary
	CSS_DEF_DEFECT_TASK_MODIFY
	View/Edit/Search/Defect Tasks
	CSS_DEF_HOME_PAGE_VIEW
	View the Homepage
	CSS_DEF_DEFECT_VIEW
	View Defects
	CSS_DEF_LOV_VIEW
	View List of Values

Role/Description	Permission/Description
Defects (Optional)	
CSS_DEF_DEFECT_KB_SUBMIT	CSS_DEF_DEFECT_KB_SUBMIT
Submit Defect to Knowledge Base	*Submit Defect to Knowledge Base*
CSS_DEF_DEFECT_MASS_UPDATE_REG	CSS_DEF_DEFECT_MASSUPDATE_REGULAR
User Mass Update	*Mass Update Defects*
CSS_DEF_DEFECT_RESOLUTION	CSS_DEF_DEFECT_RESOLUTION
Defect Resolution Handling	*Change any field in Defect Resolution Section*
CSS_DEF_DEFECT_NOTE_MODIFY	CSS_DEF_DEFECT_NOTE_MODIFY
Defect Note Handling	*Change any Defect Note*

Role/Description	**Permission/Description**
Enhancements:	
CSS_DEF_ENH_MODIFY_USER	CSS_DEF_ENH_ADD
Comprehensive User Enhancement Handling	*Create Enhancement*
	CSS_DEF_ENH_MODIFY
	View/Update Enhancement
	CSS_DEF_ENH_NOTE_READONLY
	View Enhancement Note
	CSS_DEF_ENH_ATTACH_MODIFY
	Download/Upload Enhancement Attachments
	CSS_DEF_ENH_CUST_PREVIEW_VIEW
	View Customer View of Enhancements
	CSS_DEF_ENH_PRINT_PREVIEW_VIEW
	Printer Friendly Format of Enhancement
	CSS_DEF_ENH_REPORT
	View/Update/Create Enhancement Reports
	CSS_DEF_ENH_SERVICE_REQUEST_VIEW
	View Enhancement Related Service Requests
	CSS_DEF_ENH_SUMMARYVIEW_VIEW
	View Enhancement Summary
	CSS_DEF_ENH_SUMMARY_PRINT_VIEW
	Print Preview Enhancement Summary
	CSS_DEF_ENH_TASK_MODIFY
	View/Edit/Search Enhancement Tasks
	CSS_DEF_HOME_PAGE_VIEW
	View Homepage
	CSS_DEF_ENH_VIEW
	View Defects
	CSS_DEF_LOV_VIEW
	View List of Values
Enhancements (Optional)	
CSS_DEF_ENH_MASS_UPDATE_REG	CSS_DEF_ENH_MASSUPDATE_REGULAR
Mass Update Enhancement	*Perform Mass Update Enhancements*
CSS_DEF_ENH_RESOLUTION	CSS_DEF_ENH_RESOLUTION
Enhancement Resolution Handling	*Change any field in Enhancement Engineering Resolution section*
CSS_DEF_ENH_NOTE_MODIFY	CSS_DEF_ENH_NOTE_MODIFY
Enhancement Note Handling	*Change any Enhancement Note*

B

Appendix B Seeded Data

This Appendix contains information about seeded data in Oracle Quality Online.

B.1 Seeded Data

The seeded data in Oracle Quality Online allows the user to leverage out of the box attributes and predefined parameters. Oracle Quality Online can accommodate additional attributes to fit your business processes. The following is a comprehensive list of the seeded data currently included in the application.

B.1.1 Types

The following table lists the Seeded Types for Defects and Enhancements.

Category	Types
Defect	Performance
	User Interface
	Integration
	Stability
	Installation
	Data Corruption
	Documentation
	Translation

Category	Types
Enhancement	Strategic
	Functional
	Integration
	User Interface
	Documentation
	Performance

B.1.2 Phases and Phase Statuses

The following table lists seeded Phases and Phase Statuses for Defects.

Phase	Phase Status	Combination Valid when Open? Combination Valid when Closed?
Definition	Need more Information	Open, Closed
	Could not Reproduce	Open, Closed
Response	Under Review	Open
Resolution	Under Diagnosis	Open
	Work In Progress	Open
	Awaiting Dependent Fix (Base Defect Required)	Open
Quality Assurance	Defect Resolved (Resolved, Fix Details Required)	Open
Documentation	Defect Resolved (Resolved, Fix Details Required)	Open
Customer Verification	Obsolete Configuration (Resolved)	Open, Closed
	Third Party Problem (Resolved)	Open, Closed
	Environment Problem (Resolved)	Open, Closed
	Not Feasible to Fix (Resolved)	Open, Closed
	Not a Defect (Resolved)	Open, Closed
	Duplicate Defect (Resolved, Base Defect Required)	Open, Closed
	Defect Resolved (Resolved, Fix Details Required)	Open, Closed

The following table lists seeded Phases and Phase Statuses for Enhancements

Phase	Phase Status	Combination Valid when Open? Combination Valid when Closed?
Request	Need more Information	Open, Closed
Functional Review	Request Rejected (Resolved)	Closed
	Duplicate Request (Resolved, Base Defect Required)	Closed
Technical Review	Request Rejected (Resolved)	Closed
	Duplicate Request (Resolved, Base Defect Required)	Closed
External Review	none	
Approved	none	
Scheduled	Request Implemented (Resolved, Fix Details Required)	Closed

B.1.3 Seeded Territory Qualifiers

The following table lists Seeded Territory Qualifiers.

Seeded Territory Qualifiers:	
Product	Customer
Product Version	Type
Component	Internal Priority
Component Version	Lifecycle
Sub-component	Platform Specific Flag
Sub-component Version	Phase Status
Platform	Language
Platform Version	Category
Customer Type	Severity / Desirability

B.1.4 Other Seeded Data

The following table lists additional Seeded Data

Classification	Seeded Data
Severity	Complete Service Loss
	Severe Service Loss
	Minimal Service Loss
	No Service Loss
Desirability	Extremely Desirable
	Very Desirable
	Somewhat Desirable
	Minor Improvement
Priority	Critical
	High
	Medium
	Low
	Not Scheduled
Production Status	Production
	Beta
	Alpha
	Development
Reproducibility	Always
	Intermittent
	Once
Languages	All Languages
Defect Note Types	Problem Statement
	Normal Statement
	Workaround
	Action
	Symptom
	Cause
	Fact
	Objective

Classification	Seeded Data
Enhancement Note Types	Enhancement Request
	Business Justification
	Response
Relationship Types	Base
	Related
Source Modification Types	Functional
	User Interface
	Documentation
Enhancement Templates	Enhancement Request and Business Need
Defect Task Types	General
Enhancement Task Types	General
Defect Task Priorities	Critical
	High
	Medium
	Low
Enhancement Task Priorities	Critical
	High
	Medium
	Low

C

Appendix C Territory Setup

This appendix provides an example of a Territory Setup.

C.1 Example of Territory Setup

Example: Presuming that the territories are set up based on Products

Territory 1 --> No. of Winners = 1, Product = Oracle Quality Online

Territory 2 --> No. of Winners = 1, Product = TeleService

In the above case, ranks do not make sense as the two parents have distinct qualifier values (One defect can never have two products). However, rank cannot be a negative integer.

Territory 1 has the following children:

- Territory 3 --> Rank = 1, Phase = Definition
- Territory 4 --> Rank = 2, Type = Functional

Territory 2 has the following children:

- Territory 5 --> Rank = 1, Phase = Definition
- Territory 6 --> Rank = 2, Type = Functional

If a defect is logged against Oracle Quality Online with Type as Functional and Phase as Definition, then Territory 3 is selected as it has the lowest Rank. If a defect is logged against Oracle Quality Online with Type as Functional and Phase as QA, Territory 4 is selected and if defect is logged against Oracle Quality Online with Type as Performance and Phase as QA then Territory 1 is selected. In this case, Territory 1 is acting as a placeholder (aka Catch All for Product Oracle Quality Online).

If you create another territory with Product as Oracle Quality Online and log a defect against Oracle Quality Online, you will get *Defect falls in multiple territories* error as two territories are based on Product Oracle Quality Online. The same error occurs when you have two territories under Territory 1 with Phase as Definition. If a defect is logged against a Product, which is neither Oracle Quality Online nor TeleService, then you will get *No Resources Found* error.