Oracle® *i*Support

Implementation Guide

Release 11*i*

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

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

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Preface

Welcome to Release 11*i* of the *Oracle iSupport Implementation Guide*. This guide is intended to be utilized in the implementation of Oracle *i*Support version 11*i* (11.5.6).

Audience for this Guide

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

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

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

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

How To Use This Guide

This guide contains the information you need to implement Oracle *i*Support and Oracle Knowledge Management, release 11.5.6. It is organized into the following chapters:

- Chapter 1 -- *Introduction* -- Contains an overview of the features and functionality of Oracle *i*Support. It also highlights what is new in this release of the application.

- Chapter 2 -- *Technology, Requirements, and Performance* -- contains an architectural overview of the application, as well as the minimum software and hardware requirements of Oracle *i*Support.
- Chapter 3 -- *Dependency Requirements and Verification* -- details Oracle *i*Support's dependency relationships with other Oracle applications. This chapter also provides installation and dependency verification steps.
- Chapter 4 -- *Implementation Overview* -- describes in general terms the high-level implementation steps for Oracle *i*Support and its dependencies.
- Chapter 5 -- *Implementation Task*s -- provides the step-by-step instructions required to successfully set up Oracle *i*Support and its dependencies.
- Chapter 6 -- *Verifying the Implementation* -- can assist you in verifying that you have successfully implemented the major features and functionality of Oracle *i*Support.
- Chapter 7 -- *Integrating Oracle iSupport with Service Request* -- contains information to successfully implement the service request functionality of Oracle *i*Support.
- Chapter 8 -- *Integrating Oracle iSupport with Products and Returns* -- details the Oracle applications that provide product information to various processes. This chapter also describes the returns process and setup dependencies for returns.
- Chapter 9 -- *Integrating Oracle iSupport with Oracle Knowledge Management* -- describes how to set up the Knowledge Management application.
- Chapter 10 -- *Integrating Oracle iSupport with Oracle Workflow* -- discusses the functionality that Oracle Workflow provides to Oracle *i*Support.
- Chapter 11 -- *Diagnostics and Troubleshooting* -- provides details of common problems found while implementing or accessing the application. This chapter also contains FAQs for Oracle *i*Support administration.
- Appendix A -- *Profile Options* -- describes how to set up the profile options related to implementing Oracle *i*Support.
- Appendix B -- *Seed Data* -- provides information on the data that is seeded within Oracle *i*Support.
- Appendix C -- *Oracle iSupport APIs* -- lists the iSupport-specific APIs that are public, published, and supported by Oracle.

Typographic Conventions

This manual uses the typographic conventions listed in the following table:

Convention	Meaning
italic text	Book or chapter titles
`Courier text`	User commands, file content examples, directory names
UPPERCASE	Structured Query Language (SQL) commands, initialization parameters, profile options, responsibilities, or environment variables
boldface text	Menu, button, keyboard, and form options, emphasis
< >	Angle brackets enclose user-supplied names. Note: Do not type the angle brackets.

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 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 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.

Related Documentation and Training

Oracle *i*Support shares business and setup information with other Oracle Applications products. Therefore, you will need to refer to other documentation

when setting up the application. You also may wish to access training. This section discusses your documentation and training options.

Documentation Related to Oracle iSupport Setup/Usage

Oracle *i*Support online HTML help is available by selecting CRM Applications > Internet Business Applications > Oracle iSupport from the online help menu. Printed versions of the user and implementation manuals are available for purchase from Oracle Store (http://store.oracle.com) and Oracle Documentation Center (http://docs.oracle.com). Online HTML help patches and PDF versions of guides are available on Oracle MetaLink (http://metalink.oracle.com).

Available PDF version of the guides used for implementing and using Oracle *i*Support and its dependencies are listed below.

- **Oracle iSupport Guides**
  - *Oracle iSupport Implementation Guide*
  - *Oracle iSupport Concepts and Procedures*
- **Knowledge Base Applications Guides**
  - *Oracle iSupport Implementation Guide: Integrating Oracle iSupport with Oracle Knowledge Management chapter*
  - *Oracle iSupport Concepts and Procedures: Using Oracle Knowledge Management and Understanding Oracle Knowledge Management*
  - *Oracle Marketing Encyclopedia System Implementation Guide*
  - *Oracle Marketing Encyclopedia System Concepts and Procedures*
- **Oracle Products Applications Guides**
  - *Oracle Inventory Implementation Guide*
  - *Oracle Inventory Concepts and Procedures*
  - *Oracle Bills of Material (BOM) Implementation Guide*
  - *Oracle Bill of Materials (BOM) Concepts and Procedures*
  - *Oracle Install Base Implementation Guide*
  - *Oracle Install Base Concepts and Procedures*
- **Oracle Purchasing-Related Applications Guides**
  - *Oracle Order Management Implementation Guide*

- *Oracle Order Management User's Guide*
- *Oracle Quoting-Forms Implementation Guide*
- *Oracle Quoting-Forms Concepts and Procedures*
- *Oracle iStore Implementation Guide*
- *Oracle iStore Concepts and Procedures*

- **Oracle Customer Support/Service Request Applications Guides**
  - *Oracle Support Concepts and Procedures*
  - *Oracle Support Implementation Guide*
  - *Oracle Customer Care Concepts and Procedures*
  - *Oracle Customer Care Implementation Guide*
  - *System Test Plan - Customer Support*
- **Oracle Contracts Applications Guides**
  - *Oracle Contracts for Service Concepts and Procedures*
  - *Oracle Contracts Core Concepts and Procedures*
- **Oracle Telephony Manager Guides**
  - *Oracle Telephony Manager Implementation Guide*
  - *Oracle Telephony Manager Concepts and Procedures*
- **Oracle Call Center Guides**
  - *Installing Oracle Call Center Connectors*
  - *Oracle Call Center Connectors Implementation Guide*
  - *Oracle Call Center Applications Setup*
- **Oracle Scripting Guides**
  - *Oracle Scripting Implementation Guide, Release 11i*
  - *Oracle Scripting Concepts and Procedures, Release 11i*
- **Oracle Quality Online (formerly DEMS) Guides**
  - *Oracle Quality Online Implementation Guide, Release 11i*
  - *Oracle Quality Online Concepts and Procedures, Release 11i*

Documentation Related to All Oracle Products

All Oracle Applications documentation is available online (HTML or PDF) by selecting Library from the documentation CD-ROM, or by selecting the Help button on the user interface (UI). Online HTML help patches and PDF versions of guides are available on Oracle MetaLink (http://metalink.oracle.com).

Oracle Applications User's Guide

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

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

Oracle Applications Concepts

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

Installing Oracle Applications

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

Oracle Applications Supplemental CRM Installation Steps

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

Upgrading Oracle Applications

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle *i*Support. This manual details additional steps and setup considerations for implementing Oracle *i*Support with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle *i*Support with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle *i*Support.

Oracle Workflow Guide

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

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

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

Oracle Manufacturing APIs and Open Interfaces Manual

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

Oracle Order Management Suite APIs and Open Interfaces Manual

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

Oracle Applications Message Reference Manual

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

Oracle CRM Application Foundation Implementation Guide

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

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle *i*Support 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 *i*Support 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). Bugs created against the Oracle *i*Support application use the bug identifier number of 381.

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.

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

Introduction

This topic group provides an introduction to the Oracle *i*Support 11*i* application and its components, and lists features and functionality new in this release.

- Oracle CRM E-Commerce Suite Overview
- Oracle iSupport Overview
- New in the 11.5.6 Release

1.1 Oracle CRM E-Commerce Suite Overview

Oracle CRM E-Commerce Suite, Release 11*i*, is a comprehensive, fully web-based solution for unassisted business-to-business and business-to-consumer selling, marketing, and servicing via the Internet. The E-Commerce suite applications cover the entire spectrum of e-commerce, including customer relationship management, business-to-business, financials, projects, human resources, and business intelligence. For more information, visit the Oracle website at:

http://oracle.com.

1.2 Oracle *i*Support Overview

Oracle *i*Support is an Internet-based customer support application that enables merchants to provide self-service customer support online. Oracle *i*Support functionality allows organizations to provide users with support information and problem solutions. Integration with other Oracle products gives users the ability to manage their own service needs.

A fully-realized Oracle *i*Support implementation can reduce service costs, consolidate service and product information, and allow service personnel to focus

on non-repetitive customer requests, thus increasing customer satisfaction and product viability.

1.2.1 Oracle *i*Support Key Features

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

1.2.1.1 Service Request

Oracle *i*Support enables users to manage their service request activity online. This functionality is available if the merchant sets up the service request functionality detailed in the chapter, *Integrating Oracle iSupport with Service Request*. Additional support features can be realized by implementing Oracle Knowledge Management and the products and returns features. See the chapters, *Integrating Oracle iSupport with Oracle Knowledge Management* and *Integrating Oracle iSupport with Products and Returns* for more information.

Once the service request information has been entered, it is validated by Oracle Customer Support (TeleService) and assigned a unique tracking number for future reference. Merchants can enforce product selection and/or knowledge base searching during the service request process.

A typical business scenario might be:

- Customer logs in to Oracle *i*Support.
- Customer queries knowledge base directly for troubleshooting help prior to creating a new request.
- Customer accesses Create Service Request screen and enters contact and service request detail information. Customer sets up optional service request profile to aid in date entry for submitting this and future service requests. Customer may also attach any type of file(s) to the service request.
- Once the service request is submitted, the system returns a tracking number to the customer. At the end of the service request submission process, customers have the option of adding the service request link to the Homepage, and/or having the service request details sent to the e-mail address that is set up in the Personal Profile.
- After service request submission, customers can view, close, update, attach additional files, and/or conditionally re-open their service requests.

1.2.1.2 Knowledge Base

Oracle Knowledge Management and Marketing Encyclopedia System (MES) implementation allows access to the known problems/solutions database, and permits users to locate technical documents, including white papers, user guides, and FAQs. The merchant benefits by increased knowledge among customers and reduced call center activity. The Knowledge Management and MES user interfaces are easy to use and feature flexible search capabilities. For additional information, see the *Oracle Marketing Encyclopedia Implementation Guide* and *Integrating Oracle iSupport with Oracle Knowledge Management* chapter of this guide.

A typical business scenario might be:

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

1.2.1.3 Account Management

Oracle *i*Support's optional account management functionality allows users to view detailed transaction history and status, and to create returns. Integration with products and returns applications allows a user to view orders, invoices, payments, and shipping information, as well as to create return material authorizations (RMAs). Integration with Oracle Contracts Suite, if these optional modules are implemented, provides a view of contracts, entitlements validation, and customer service programs and warranties.

If all required applications are implemented, this functionality allows customers to service their own account needs. For more information, see the chapter, *Integrating Oracle iSupport with Products and Returns*. For setting up Contracts functionality, refer to *Oracle Contracts Core Implementation Guide*, and *Oracle Contracts for Service Implementation Guide*.

A typical business scenario might be:

- Customer logs in to Oracle *i*Support.
- Using the Accounts tab, the customer has online, real-time access to information regarding account data, including:
  - Orders

- Shipments
- Invoices
- Payments
- Contracts
- Returns

1.2.1.4 Products Repository

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

Required integration with Oracle Inventory, as well as optional integration with Oracle Bills of Material, further facilitate access to product information. With Products functionality, users can manage and track products themselves online, thus decreasing calls to customer service centers and increasing customer control over service issues. For more information, see the chapter, *Integrating Oracle iSupport with Products and Returns.*

A typical business scenario might be:

- Customer logs in to Oracle *i*Support.
- Customer accesses Install Base from the Products tab.
- Customer reviews product details and / or adds products to the Install Base.

1.2.1.5 Oracle iSupport Homepage

Oracle *i*Support's homepage features links to support areas of the application.

General users can personalize their homepages with links to service request activity and knowledge base search results. The user also has the option of having the contents of his homepage e-mailed to him; this is known as a homepage subscription.

Integration with Oracle Marketing Encyclopedia System enables merchants to send alerts and other system messages to the homepage for viewing by general users and employees. The merchant has the option of making some homepage content mandatory.

For more information, see the Setting up iSupport Homepage topic area in this guide's *Implementation Tasks* chapter.

A typical business scenario might be:

- Customer logs in to Oracle *i*Support and access the Homepage (the initial landing page).
- Customer views Alerts, company news, or other content provided by the administrator.
- Customer accesses Content hyperlink to add or remove content.
- Customer accesses Layout hyperlink to change the layout of content.
- Customer selects Edit hyperlink on Service Request Quick Links, Service Request (saved views), and / or Quick Links bins to configure display of these bins.

1.2.1.6 Oracle iSupport Forums

Oracle *i*Support Forums are online message boards where customers can post questions and comments and review those from other users. Organized into categories, forums enable customers to share information. In Oracle *i*Support, users can search for specific subjects or browse within a particular forum. Oracle *i*Support allows merchants to create and manage forums, and to use forum moderators for certain forum administrative tasks. For more information, see the Setting up iSupport Forums topic area in this guide's *Implementation Tasks* chapter.

A typical business scenario might be:

- Customer logs in to Oracle *i*Support.
- Customer accesses Forums tab to view organized categories and forums subcategories.
- Customer selects a hyperlinked forum message, views the message, and can post a new message underneath that forum message or start a new message thread.
- Customer can use forums signature feature to allow personalized signing of his forum messages.

- Customer can use Advanced Search to query by keyword, category, date, message status, and author.

1.3 New in this Release

Oracle *i*Support contains the following new functionality in this release.

Service Request

- Customizable templates used for gathering relevant data about service requests
- Ability by users to close, update, and conditionally re-open service requests

Users and User Management

- Support for Employee User type
- User registration framework
- User profile settings

Homepage

- Service request bookmark bin
- Service request views (saved searches) bin

Install Base

- Uptake of Install Base 11.5.6 features, including ability to create products

Forums

- Ability by user to "subscribe" to forums
- Ability by administrator to create forum moderators

Knowledge Management

- Solution authoring ability with source control features
- Categorization of solutions
- Ability to search for matching statements / solutions while creating a statement
- Ability to find related statements / solutions to reuse when creation solutions
- Ability to search for solutions by category, product, or platform

- Ability to add external links and / or comments to solutions
- Multiple search methods, including Intermedia text, user defined, keyword, and boolean
- Integration with Oracle Workflow to manage the solution creation process

2

Technology, Requirements, and Performance

This chapter provides details on the architecture of Oracle *i*Support 11*i*.

2.1 Architectural Overview

Oracle *i*Support runs on a 3-tier system comprised of:

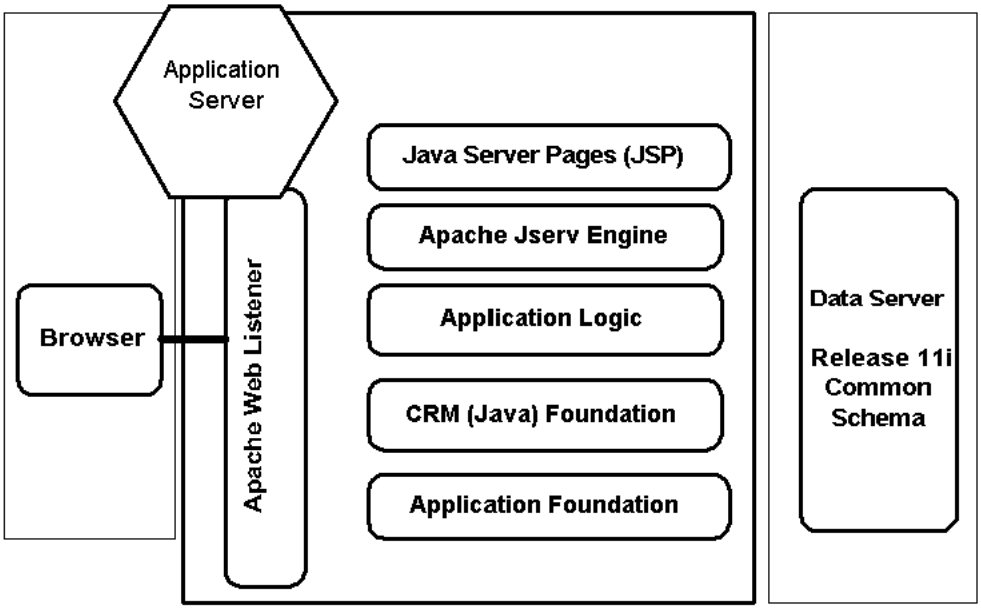
Data Tier - The data tier includes Oracle ERP and CRM main tables which comprise their common schema. These are driven by the Oracle 8i database. Most of the CRM application business logic that is written in PL/SQL are also in the data tier.

Application Tier - The application tier uses business logic APIs and CRM Foundation services, Java Server Pages (JSP), and Java APIs. In addition, the Oracle Application Object Library (AOL) supplies technology and common libraries for the applications. In Oracle applications, 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 and Servlet 2.0 to form the presentation tier. In Oracle applications, the Apache Server 1.3.9 drives this tier.

The diagram below depicts this 3-tier structure.

Figure 2–1 Oracle iSupport Architecture



3

Dependency Requirements and Verification

This chapter describes in general terms the dependency requirements and verification of dependencies for Oracle *i*Support 11*i*. Topics include:

- Overview of Dependencies
- Mandatory Dependencies
- Conditional Dependencies

3.1 Overview of Dependencies

Because Oracle *i*Support is comprised of multiple Oracle modules supplying varied data and functionality, merchants can choose which modules to implement, based on their specific business requirements. These integrated modules present many dependencies to Oracle *i*Support.

Dependencies are classified as either *mandatory*, meaning that Oracle *i*Support cannot function without them, or *conditional*, meaning that they supply additional functionality, but are not required to run Oracle *i*Support. The Mandatory and Conditional Dependencies sections in this chapter provide overviews of these dependencies.

For documentation and training related to these modules, please see the Preface to this guide.

3.2 Mandatory Dependencies

Oracle *i*Support relies on several Oracle ERP and CRM modules for its data and functionality. The modules that must be installed and set up for Oracle *i*Support to function properly are discussed in the following paragraphs.

3.2.1 Oracle Application Object Library (AOL)

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

3.2.2 Oracle CRM Technology Foundation

Oracle CRM Technology Foundation is a prerequisite for implementation of any Oracle CRM module. The technology stack supplies debug logging trails and cookie encryption.

3.2.3 Oracle Workflow

In all Oracle applications, Oracle Workflow provides the ability to send e-mail notifications, and allows you to define various workflow processes required for normal business operations. Oracle Applications 11*i* comes with Oracle Workflow (WF) already installed as part of the Applications Object Library (AOL). For details on how Oracle *i*Support uses Oracle Workflow, please see the chapter in this guide, *Integrating Oracle iSupport with Oracle Workflow.*

3.2.4 Oracle Trading Community

The 11*i* Oracle Trading Community Model -- also known as Oracle Trading Community Architecture or the acronym, TCA -- consists of a database schema, APIs, and data quality management utilities that allow you to capture and exploit valuable information about your commercial community: organizations, people, places, and the network of relationships that bring them together. Oracle Trading Community is used by both Oracle ERP and Oracle CRM applications. In R11*i*, Oracle's customer model is TCA.

Some APIs for TCA are being published as part of Release 11.5.6. Refer to current TCA documentation for API details.

3.2.5 Accounts Receivable

A central data repository for customer information that uses the TCA model, Oracle Accounts Receivable (AR) provides customer account data for Oracle *i*Support. Once a customer books an order in an Oracle CRM application, an account is created in AR. If a customer is directly created in AR, an account number is also generated. AR also calculates taxes and generates invoices.

3.2.6 Oracle General Ledger

Oracle *i*Support uses General Ledger to set up ledgers and books, store exchange rates, and store related business information. Refer to *Oracle General Ledger User Guide* for complete setup information.

3.2.7 Human Resource Management System

Oracle Human Resources Management System (HRMS) provides employee data for CRM and ERP applications.

3.2.8 Oracle CRM Foundation

CRM Foundation 11*i* suite of applications supplies a significant amount of functionality for Oracle *i*Support. Beginning with the 11.5.6 release, the CRM Foundation software suite has been split into two distinct but interrelated application groups:

- **CRM Technology Foundation** (JTT) - Provides Java-based infrastructure software that is used to develop e-business solutions such as Sales, Marketing, Service, E-Commerce, Contracts, and Interaction Center applications. It offers a common platform for developing applications with HTML, XML, and Java. It also provides user-friendly screens for centralized setup and administration. This web-based interface is called the System Administrator Console. The CRM User Management Framework uses this application group. For more information, see the *Oracle CRM Technology Foundation Implementation Guide* and the *Oracle CRM Technology Foundation Concepts and Procedures*.
- **CRM Application Foundation** (JTA) - Consists of the following CRM applications: Territory Manager, Resource Manager, Notes, Calendar, Task Manager, Interaction History, Fulfillment, Assignment Manager, and Escalation Management. Documentation for this application group also includes information on using Spreadtables and TCF Servers for Gantt. For more information, see *Oracle CRM Application Foundation Implementation Guide* and the *Oracle CRM Application Foundation Concepts and Procedures*.

  In Oracle *i*Support, the service request processes are highly dependent upon Assignment Manager, Notes, Resource Manager, and Territory Manager. Knowledge Management also uses Notes and Resource Manager. For more information, see *Integrating Oracle iSupport with Service Request* and *Integrating Oracle iSupport with Knowledge Management*.

3.3 Conditional Dependencies

Oracle *i*Support relies on several other Oracle applications to extend its functionality. The applications that are conditional to Oracle *i*Support are discussed in the following paragraphs.

3.3.1 Oracle Customer Support (TeleService)

A forms-based product, Oracle Customer Support (TeleService) contains the bulk of the service request functionality for Oracle *i*Support. Integration with Oracle Support allows customers using Oracle *i*Support to submit, view, edit, and re-open their service requests online. Setup information is in the chapter, *Integrating Oracle iSupport with Service Request*.

3.3.2 Oracle Inventory and Oracle Install Base

Oracle Inventory supplies the infrastructure that contains an organization's entire product repository and configuration. It integrates closely with Install Base, which is the repository of customer- or party-purchased products. Both Inventory and Install Base are required for full service request functionality in Oracle *i*Support. Both applications also supply product information during retrieval of account information on the Oracle *i*Support Accounts tab. Setup information is in the chapter, *Integrating Oracle iSupport with Products and Returns*.

3.3.3 Oracle Bills of Materials

Oracle Bills of Materials (BOM) allows you to configure groups of products into coordinated and complementary systems. BOM allows the creation of products containing multiple components and subcomponents. It integrates with Inventory and Install Base. Setup information is in the chapter, *Integrating Oracle iSupport with Products and Returns*.

3.3.4 Oracle Order Management

Oracle Order Management (OM) processes orders booked in Oracle Forms-Quoting, Oracle HTML-Quoting, Oracle iStore, and Oracle Order Management itself. OM and Oracle Quoting-Forms are both integral applications for returns functionality in Oracle *i*Support. OM integrates with Oracle Pricing for determining prices of goods sold and Oracle Shipping for shipping execution. OM uses Oracle Receivables for keeping records of customers and invoices, and capturing payments. OM also depends on Oracle General Ledger. Setup information is in the chapter, *Integrating Oracle iSupport with Products and Returns*.

3.3.5 Oracle Quoting-Forms and Order Capture APIs

Orders quoted in Oracle Quoting-Forms (formerly called Oracle Order Capture) are sent to Order Management for processing. These orders then can be viewed within the Oracle *i*Support Accounts tab. There are three parts to quoting: Oracle Quoting-Forms, Oracle Quoting-HTML, and Order Capture APIs. All of these coordinate in the returns process, and Oracle Order Capture APIs are essential to returns functionality in Oracle *i*Support. Setup information is in the chapter, *Integrating Oracle iSupport with Products and Returns*.

3.3.6 Oracle Purchasing

The Receipts form of Oracle Purchasing receives returns created in Oracle *i*Support. Setup information is in the chapter, *Integrating Oracle iSupport with Products and Returns*.

3.3.7 Oracle iStore

The Oracle iStore application provides allows merchants to set up Internet storefronts that capture and process customer orders. Oracle iStore is not required for any functionality within Oracle *i*Support, but orders placed in Oracle iStore can be viewed within the Oracle *i*Support Accounts tab. Setup information is contained within the *Oracle iStore Implementation Guide.*

3.3.8 Oracle Contracts Suite

Oracle Contracts Suite - made up of Contracts Core and Contracts for Service - provides a complete range of contracts creation, service, organization, and termination. Oracle *i*Support relies on the Contracts Suite to provide data about customer entitlements, service contracts, warranties, extended warranties, and response commitments. This data is retrieved by Oracle *i*Support when customers view account information and create service requests. See the latest Contracts documentation available on MetaLink for setup information.

3.3.8.1 Contracts Core

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

3.3.8.2 Contracts for Service

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

3.3.9 Oracle Customer Care

Oracle Customer Care is comprised of four modules:

- Contact Center
- Relationship Plans
- Customer Profile / Dashboard
- Critical Customer Management

These modules allow customer support agents to manage many aspects of support, including real-time interactions, information retrieval, customer creation, historical views, service request creation, knowledge base data retrieval, product management, and relationship plans.

Oracle Customer Care integrates with several ERP and CRM modules to support and extend its functionality. Setup information can be found in the *Oracle Customer Care Implementation Guide*.

3.3.10 Oracle Knowledge Management

In Oracle *i*Support, Oracle Knowledge Management (KM) allows knowledge base searches during service request creation, the display of frequently used solutions on the homepage, and knowledge base searches from the Support tab. For the 11.5.6 release of KM, all KM documentation is contained within the Oracle *i*Support documentation. Setup information is in the chapter, *Integrating Oracle iSupport with Oracle Knowledge Management*.

3.3.11 Oracle Marketing Encyclopedia System

In Oracle *i*Support, Oracle Marketing Encyclopedia System (MES) provides functionality for publishing information to the homepage Alerts bin, displaying other optional homepage content, and searching the technical library from the Support tab. Setup information can be found in the *Oracle Marketing Encyclopedia System Implementation Guide*.

3.3.12 Web Call-Back Dependencies

The Web Call-Back (Call Me) feature allows users to submit a call-back request via the Oracle *i*Support UI. The web call-back requires implementation of the CRM Interaction Center (formerly Call Center Technology - CCT) suite of applications and the purchase of call center hardware. It also requires the implementation of Oracle Universal Work Queue (UWQ), Oracle Customer Care, and Oracle CRM Foundation Notes module. For further information, see the Setting up iSupport Web Call-Back in the *Implementation Tasks* chapter.

3.3.13 Oracle Scripting

Oracle *i*Support uses Oracle Scripting to provide Surveys functionality. Scripting also presents scripts to the desktop of an Interaction Center agent to aid customer service. For further information, see the Setting up iSupport Surveys topic in the *Implementation Tasks* chapter.

4

Implementation Overview

This chapter provides an overview of the implementation process for Oracle *i*Support 11*i* (11.5.6).

Topics include:

- Process Overview
- Implementation Task Sequence

4.1 Process Overview

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

The tasks described in this guide are meant to assist your set up of Oracle *i*Support, Release 11*i*, version 11.5.6. Many companies installing Oracle *i*Support already are running some of the mandatory and/or conditional Oracle applications, and for them, Oracle *i*Support is an add-on or upgrade. Thus, depending upon your particular situation, you may or may not need to perform all of the tasks listed here.

4.2 Implementation Task Sequence

The following table, Oracle *i*Support Implementation Steps, shows the recommended task sequence for setting up Oracle *i*Support.

Table 4–1 Oracle iSupport Implementation Steps

Step	Required?	Related Documentation
Install Oracle iSupport	Yes	*Oracle iSupport Implementation Guide*
Confirm General Oracle Applications Setups	Yes	*Oracle iSupport Implementation Guide, Preface*
Perform System Administrator Setups for iSupport	Yes	*Oracle iSupport Implementation Guide* *Oracle Applications System Administrator's Guide*
Set up Oracle Workflow	Yes	*Oracle iSupport Implementation Guide, Chapter 10, Integrating Oracle iSupport with Oracle Workflow* *Oracle Workflow Guide* *Oracle Workflow Guide Documentation Update, Release 2.6.1* *Oracle Workflow Builder Documentation Supplement Release 2.6.1*
Set up Oracle CRM Foundation	Yes	*Oracle CRM Technology Foundation Implementation Guide* *Oracle CRM Application Foundation Implementation Guide*
Set up Oracle iSupport Users	Yes	*Oracle iSupport Implementation Guide, Chapter 5, Implementation Tasks*
Set up Oracle iSupport Homepage	Yes	*Oracle iSupport Implementation Guide, Chapter 5, Implementation Tasks*
Set up CRM User Management Framework	No	*Oracle CRM Technology Foundation Implementation Guide*
Set up Service Request	No	*Oracle iSupport Implementation Guide, Chapter 7, Integrating Oracle iSupport with Service Request* *Oracle Support Implementation Guide*
Set up Products and Returns	No	*Oracle iSupport Implementation Guide, Chapter 8, Integrating Oracle iSupport with Products and Returns*
Set up Knowledge Base Applications	No	*Oracle iSupport Implementation Guide, Chapter 9, Integrating Oracle iSupport with Oracle Knowledge Management*
Set up Oracle iSupport Forums	No	*Oracle iSupport Implementation Guide, Chapter 5, Implementation Tasks*
Set up Oracle iSupport Surveys/Feedback	No	*Oracle iSupport Implementation Guide, Chapter 5, Implementation Tasks*
Set up Oracle iSupport Web Call-Back	No	*Oracle iSupport Implementation Guide, Chapter 5, Implementation Tasks*

Table 4–1 Oracle iSupport Implementation Steps

Step	Required?	Related Documentation
Set up Oracle Contracts Applications	No	*Oracle iSupport Implementation Guide, Chapter 5, Implementation Tasks* *Oracle Contracts Core Concepts and Procedures* *Oracle Contracts for Service Concepts and Procedures*
Set up Oracle Customer Care	No	*Oracle Customer Care Implementation Guide*
Verify the Implementation	No	*Oracle iSupport Implementation Guide, Chapter 6, Verifying the Implementation*

5

Implementation Tasks

This topic group provides step-by-step implementation tasks for setting up Oracle *i*Support 11*i* (11.5.6). Topics include:

- Installing the Application
- Confirming General Oracle Applications Setups
- Performing System Administration Setups
- Setting up Oracle Workflow
- Setting up Oracle CRM Foundation
- Setting up iSupport Users
- Setting up iSupport Homepage
- Setting up Oracle CRM User Management Framework
- Setting up Service Request
- Setting up Products and Returns
- Setting up Knowledge Base Applications
- Setting up iSupport Forums
- Setting up iSupport Surveys
- Setting up iSupport Web Call-Back (Call Me)
- Setting up Oracle Contracts Applications
- Setting up Oracle Customer Care
- Verifying the Implementation

5.1 Installing the Application

Oracle is strongly encouraging all applications customers to install the latest 11*i* CD Pack or upgrade to the latest Maintenance Pack. The Maintenance Pack is a consolidation of product minipacks. Customers wishing to upgrade their pre-11.5.6 applications may upgrade to version 11.5.6 by applying the Maintenance Pack.

To obtain the Maintenance Pack, go to the Oracle MetaLink homepage and click on Patches (left hand menu), enter patch number 1808429 in the Patch Number box, select your platform in the Platform box, and press the Submit button.

Customers who are upgrading from an earlier version of applications (R10.7 or R11 for example) or conducting a fresh installation of the applications should order the latest Release 11i CD Pack from Oracle Store (http://store.oracle.com).

As with any maintenance pack, you may need to apply additional individual product patches in order to bring your applications to the latest code. Please continue to check for high-priority patches for your product areas via the Patches button on the MetaLink homepage.

Oracle *i*Support 11.5.6 will be available on the Oracle CD Pack and on Oracle MetaLink (http://metalink.oracle.com).

Please be sure to download the latest copy of the Release Notes, Installation Update Notes for your platform and RapidWiz prior to beginning your install or upgrade.

5.1.1 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.

Note: On the screens that tell RapidWiz where to store files/directories, do not press Ctrl + V (paste) with an empty clipboard. Be sure your clipboard has some data stored on it before pressing Ctrl + V, or you will receive an error, Java.lang.NullPointerException. (The command in Windows for copying text to the clipboard is Ctrl + C.)

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 the latest version of *Installing Oracle Applications* and *Upgrading Oracle Applications*.

5.1.2 Using the Oracle Application Implementation Wizard

Use the Oracle Application Implementation Wizard (AIW) to coordinate dependency setups and identify the steps required to implement the Oracle *i*Support. You can use AIW to see the graphical overview of the steps involved, read online help on set up and open the appropriate forms. You can also document your actions for further reference and review.

The Wizard detects the products installed on your implementation site and displays all the processes you need to run in the correct order. You can locate specific processes and corresponding task assignments using a variety of flexible selection criteria. Once you are in a task, you are automatically routed from step to step.

The processes guide you through the specific implementation steps required for your installation. The sequence of steps are contingent on which application modules you install. This structure reduces complexities introduced when you must implement multiple application modules that have the same setup steps.

As you proceed through the implementation processes, you are able to document the completion of setup steps and append notes for later recall. Additionally, the Wizard provides guidance, such as instructions, options, warnings, and alerts to help with key decision making.

Refer to *Oracle Application Implementation Wizard User's Guide* for more details.

5.2 Confirming General Oracle Applications Setups

Your setup steps for Oracle *i*Support will depend upon whether you are creating a fresh install of Oracle Applications or upgrading to the current release from a previous release. The steps in this section are confirming setups of applications that all Oracle applications depend upon.

On Oracle MetaLink, the Oracle Applications Installations and Upgrade Self-Service Toolkit page contains information on the top subjects for Oracle applications installations. You will find the latest patchset information in addition to the following:

- Current Issues (alerts and selected articles)
- Patches (specific patches related to the subject)
- Setup and Usage (white papers and setup instructions for the subject)
- FAQ (Frequently Asked Questions)
- Troubleshooting (troubleshooting guide for the subject)

After logging into MetaLink (http://metalink.oracle.com), navigate to the Self-Service Toolkit page as follows:

Technical Libraries > **ERP Applications** > **Applications Installation and Upgrade**.

5.2.1 Confirming Oracle Trading Community (TCA) Setup

Ensure the set up of the following in Oracle Trading Community Model (TCA):

- Parties
- Party Relationships
- Locations
- Contact Points
- Customer Attributes

Refer to current Trading Community Model documentation for additional details.

5.2.2 Confirming Accounts Receivable Setup

Confirm the setup of Oracle Accounts Receivable.

Refer to Oracle Accounts Receivable documentation, available on Oracle MetaLink under the **Technical Library** > **Financials** > **Receivables**.

5.2.3 Defining Employees

Define or confirm the definitions of your employees in Oracle Human Resources Management System or another HR application.

For Oracle Human Resources Management System documentation, refer to the following titles available on MetaLink:

- *Implementing Oracle HRMS*
- *Using Oracle HRMS - The Fundamentals*
- *Managing People Using Oracle HRMS*
- *Customizing, Reporting and System Administration in Oracle HRMS*
- *Managing Total Compensation Using Oracle HRMS*

5.2.4 Confirming CRM Foundation Technology Stack Setup

Confirm the setup of the technology stack. Refer to CRM Foundation Technology Stack documentation, available on MetaLink. The CRM Foundation Technology stack is also known as the HTML Stack or Tech Stack.

5.3 Performing System Administration Setups

The merchant implementing Oracle *i*Support will receive a system administrator login and will use that login in the setup of the application. The system administrator username and password that are seeded are: sysadmin/sysadmin. It is recommended that you change this password to something unique.

Some of the setups listed here are optional. Refer to the text for details.

5.3.1 Confirm Menus/Functions Setup

The menus on the Oracle *i*Support HTML UI are seeded in AOL. They are linked to the seeded Functions in AOL. It is optional to confirm the setup of menus and functions.

For a list of seeded menus and functions in Oracle *i*Support, see the appendix, *Oracle iSupport Seed Data*.

5.3.1.1 Confirm Functions

Functions link to coding within specific JSPs and to application menus. Those necessary for Oracle *i*Support are seeded in AOL. To view Functions in AOL, log

into the Oracle Forms application as sysadmin and navigate to System Administrator > Application > Function. From there, query for function names that begin with `IBU_`.

5.3.1.2 Confirm iSupport Menus

Each menu in Oracle *i*Support links to a Function. Confirming Menus is not mandatory. To view Menus in AOL, log into the Oracle Forms application as sysadmin and navigate to System Administrator > Application > Menus. From there, query for menu names that begin with `IBU_`.

For additional information, see the *Oracle Applications System Administrator's Guide*.

5.3.2 Understanding Responsibilities and Roles

Responsibilities are defined for application security and determine which menus a user will see. Roles are collections of permissions which allow users to perform various functions. Roles and responsibilities must be assigned to usernames to be effective.

If you are using the CRM User Management Framework for user setup, responsibilities and roles are seeded within each User Type. As each user is approved, the default roles and responsibilities that are assigned will depend upon your setup of the user framework. Refer to the *CRM Technology Foundation Implementation Guide* for more information on what is seeded by user type, and how to customize user types.

The Oracle *i*Support module has its own seeded responsibilities and roles that you can use in addition to or in place of the user framework. Setup steps for creating users are in the Setting up Oracle iSupport Users section. Refer to the *Seed Data* appendix for Oracle *i*Support roles and responsibilities that ship with the application.

Refer to AOL documentation for information on how to set up new responsibilities, roles, and permissions, or to customize existing ones.

5.3.3 Set up Profile Options

Profile options are seeded within all Oracle applications, and each module has its own specific set of profile options. Although all profile options are seeded, there are some settings that must be performed by sysadmin. See the appendix, *Profile Options*, for details.

5.3.4 Set up Properties

There are two sets of key components for Oracle *i*Support that must be set. These are:

- Company key components
- Quick Find window key components

Steps

1. Log in to the JTF UI as sysadmin/sysadmin.
2. Navigate to Settings > System > Advanced. Select Oracle *i*Support's product code, IBU, from the View drop list.
3. Set the following company key components to appropriate values:
   - COMPANY_ADDRESS
   - COMPANY_EMAIL ADDRESS
   - COMPANY MERCHANT_NAME
   - COMPANY_NAME
   - COMPANY_URL
4. To confirm the set up the Quick Find window items, verify that the search.factories component is set to:
   - oracle.apps.ibu.requests.bean.RequestSearchFactory
5. Next, verify that the Quick Find window key components are set according to what your business processes require. Remove any items which you do not wish to use
   - When deleting items, be sure to remove the pairs of items that end in .categories and .desc.

   Here is an example of what the seeded components will be:

   Install Base:

   - service.oracle.apps.cs.inquiries.bean.IBSearchFactory.categories

     The value of this component is Install Base.
   - service.oracle.apps.cs.inquiries.bean.IBSearchFactory.desc

     The value of this component is IBSearch.item.

Forums:

- service.oracle.apps.ibu.communities.bean.MyForumSearchFactory.categories

  The value of this component is Forums.

- service.oracle.apps.ibu.communities.bean.MyForumSearchFactory.desc

  The value of this component is MyForumSearch.item.

Knowledge Management:

- service.oracle.apps.ibu.knowledge.bean.SMSSearchFactory.categories

  The value of this component is Solutions.

- service.oracle.apps.ibu.knowledge.bean.SMSSearchFactory.desc

  The value of this component is SMSSearch.item.

Marketing Encyclopedia System (MES):

- service.oracle.apps.ibu.knowledge.bean.TechLibSearchFactory.categories

  The value of this component is Library.

- service.oracle.apps.ibu.knowledge.bean.TechLibSearchFactory.desc

  The value of this component is TechLibSearch.item.

Service Request:

- service.oracle.apps.ibu.knowledge.bean.RequestSearchFactory.categories

  The value of this component is Service Requests;

- service.oracle.apps.ibu.knowledge.bean.RequestSearchFactory.desc

  The value of this component is RequestSearch.item.

5.4 Setting up Oracle Workflow

See the chapter in this guide, *Integrating Oracle iSupport with Oracle Workflow*, or refer to *Oracle Workflow Guide*.

5.5 Setting up CRM Foundation

Set up and / or confirm the setup of the CRM Foundation software suite. Oracle *i*Support service request functionality uses the Notes, Resources, and Assignment Manager modules. Oracle Knowledge Management functionality also uses Notes

and Resources. Thus, at a minimum, you should be familiar with the setup and functionality of Notes, Resources, and Assignment Manager. For information on the Oracle *i*Support-specific setups related to these modules, see these chapters:

- *Integrating Oracle iSupport with Service Request*
- *Integrating Oracle iSupport with Oracle Knowledge Management*

Refer to *CRM Application Foundation Implementation Guide* for full implementation details.

5.6 Setting up *i*Support Users

In Release 11.5.6, Oracle *i*Support has uptaken the new Oracle CRM User Management Framework. Since Oracle *i*Support also has its own user responsibilities and roles, this section contains information on setting up Oracle *i*Support users exclusive of the new framework. See Setting up Oracle CRM User Management Framework for more information on its functionality.

5.6.1 Set up Oracle *i*Support Administrator

The merchant implementing Oracle *i*Support will use the sysadmin login to set up the Oracle *i*Support Administrator. This is a required user, and is not one of the seeded user types within the CRM User Management Framework.

The Oracle *i*Support Administrator responsibility -- IBU_NORMAL_USER -- is seeded in AOL.

The menu assigned to this responsibility is called iSupport Administration Root (IBU_NORMAL_USER_TOP_MENU). See *Oracle Applications System Administrator's Guide* for more information on building menus and creating responsibilities.

The Oracle *i*Support Administrator typically performs routine but high-level administrative tasks, such as:

- Setting up users and assigning appropriate roles and responsibilities
- Setting up the application homepage
- Setting up optional service request functionality
- Setting up optional products and returns modules
- Setting up optional knowledge management modules
- Setting up optional accounts functionality

- Setting up iSupport forums
- Setting up iSupport Call Me (web call-back)
- Setting up iSupport Surveys/Feedback feature

Oracle *i*Support Administrator functions are accessible by using the Oracle *i*Support Administrator username and password on the JTF login page, and then selecting the Administration button in the top-right of the screen.

5.6.1.1 Steps to Set up Oracle iSupport Administrator

Follow the steps below to set up the Oracle *i*Support Administrator.

Prerequisite:

Employees have been defined using Oracle Human Resources Management System or another human resources application. For Oracle HRMS documentation, refer to the following titles available on MetaLink:

- *Implementing Oracle HRMS*
- *Using Oracle HRMS - The Fundamentals*
- *Managing People Using Oracle HRMS*
- *Customizing, Reporting and System Administration in Oracle HRMS*
- *Managing Total Compensation Using Oracle HRMS*

Associate User Name to Employee and Assign Responsibility

1. Log in to Oracle Forms application as sysadmin. Select System Administrator responsibility. Navigate to Security > Users > Define. The Users window opens.
2. In the Users form, enter the username for the Oracle *i*Support Administrator. An example might be IBUADMIN. (IBU is the product code for Oracle *i*Support.)
3. Associate the user with an employee by using the Person LOV in the User Form. Select the desired association by double-clicking on the employee name.
4. Tab to Password field and enter a password. Tab to clear the field and re-enter the same password to validate.
5. In the Responsibilities tab, select the **IBU_NORMAL_USER** responsibility.
6. Save changes.
7. Still using System Administrator responsibility, navigate to Profile > System.

8. Query with the username in the username field and JTF%DEF% in the Profile field.

9. Set the following profile option at the user level for the administrator:

   - **JTF_PROFILE_DEFAULT_APPLICATION** - 672

   This tells the system that the default application for this user is Oracle *i*Support, whose application ID is 672.

10. Find the responsibility ID for the IBU_NORMAL_USER responsibility (see steps below) and enter that value as the **JTF_PROFILE_DEFAULT_ RESPONSIBILITY** value. Set at user level.

    This tells the system that the default responsibility for this user is IBU_ NORMAL_USER.

5.6.1.2 Finding Responsibility ID

Use the following steps to find the RESPONSIBILITY_ID value of a responsibility. See the *Profile Options* appendix for details on determining APPLICATION_ID values -- The application ID is used when setting system profile values.

a. In Oracle Forms as System Administrator, navigate to Security > Responsibility > Define. The Responsibilities form opens.

b. From the top menu, select View > Find. Search for the IBU_NORMAL_ USER responsibility. Once found, highlight the responsibility, and click Ok in the search window. The Responsibilities form is populated with the information for the responsibility.

c. With the cursor in any field of the record, select Help > Diagnostics > Examine. The Examine Field and Variable Values form opens.

d. In the Examine Field and Variable Values form, select RESPONSIBILITY_ID from the Field LOV. The Value field displays the value of RESPONSIBILITY_ID.

11. Save and close the form.

Approval

1. Log in to the JTF login page as sysadmin. Navigate to Users > Registration > Pending Approvals.

2. In the Request Summary screen, select the appropriate underlined username.

3. Fill in the mandatory information. Click Next.
4. Select the Accounts button. Choose the company account(s) to associate with the user. Select Next.
5. Enter any comments in the Comments area. Click Accept.

Assign Role(s)

1. Navigate to Users > Registration > User Maintenance.
2. Find the user who will be the Oracle *i*Support Administrator. Select the underlined hyperlink of the username.
3. Select Roles. Assign **IBU_SYSTEM_ADMIN** and **IBU_REG_USER** to the user.
4. Select Update.
5. Log out.

Verification

1. Log in to the JTF login as the Oracle *i*Support Administrator just created.
2. Verify that appropriate menus are displayed. The Oracle *i*Support Administrator will have the following main tabs on the UI:
   - Home
   - Accounts (subtabs: Orders, Invoices, Payments, Contracts, Returns, Service Requests)
   - Products
   - Support (subtabs: Ask Me, View / Update Requests, Create Request, Call Me, Survey)
   - Forum
3. Under the Profile button, the Oracle *i*Support Administrator will have access to the following links:

   User Profile:

   - Personal Profile
   - Contact Points
   - Addresses
   - Preferences

- Accounts
- Support

4. Select the Administration button at the top of the screen. Verify that the Oracle *i*Support Administrator can access the following administrator tabs:
   - User (subtabs: User, Pending Approvals)
   - Homepage (subtabs: Content, Subscription)
   - Support (subtabs: Request Management, Call Me, Survey, Technical Library, Usergroup)
   - Forum (subtabs: Category, Forum, Messages, Usergroup)
   - Solutions (subtabs: Setup, Solution, Search)

5.6.2 Steps to Assign Additional Roles and Responsibilities in iSupport

After you have set up the Oracle *i*Support Administrator, you can use that user to assign additional responsibilities and / or roles to users.

Remember, as a CRM User Management Framework User Type is approved, the system automatically will give those users a default role(s) and a default responsibility. Which roles and responsibilities are granted depends upon how you have configured the user management framework, including what roles and responsibilities are linked to the User Type and Enrollment selected during registration.

If you are creating custom users or if you need to assign additional responsibilities or roles to users, use the following steps:

1. Log into Oracle *i*Support as the Oracle *i*Support Administrator.
2. Navigate to Administration > Users. Search for the user whom you wish to modify.
3. Select the underlined link of the username.
4. In the User Details screen, select either Roles or Responsibilities as appropriate.
5. Assign the roles / responsibilities as desired. **If you assign additional responsibilities, be sure to select a default responsibility.**

Note: The default responsibility that is active at the time a user logs in to the JTF login will determine which application he initially accesses. The user can change this default by accessing the Profile > Preferences menu in Oracle *i*Support.

5.6.3 Set up iSupport Primary User

The Oracle *i*Support Primary User typically:

- Approves other users within his party / organization
- Adds / modifies responsibilities to users within his party / organization
- Adds / modifies roles to users within his party / organization

The primary user can be approved by another primary user with the same responsibility as that of an Oracle *i*Support Primary User for the party (organization) to which the primary user belongs, or by the Oracle *i*Support Administrator.

Steps to Set up iSupport Primary User

Follow the steps below to set up the Oracle *i*Support Primary User.

Registration

1. Select the Register Here link on the JTF login. Or, have the user self-register using the Register Here link.

   Note: If you have already set up this user through the Oracle Forms interface, Oracle Human Resources Management System (HRMS), or your company's own HR application, you may skip the Registration step. Instead, associate an employee to a user name in the Forms application (as you did with the administrator-user) and assign the IBU_PRIMARY_USER_RESP responsibility there.

2. Select Primary User as the user type; click Next.
3. Enter the company ID in the textbox and Submit. The company ID is a unique number assigned during company registration. The User Registration screen appears.
4. Enter required information on the User Registration form. **Make a note of the username and password.** Select Submit. The Available Enrollments screen appears.

5. Select Self-Service Support Over the Web and click Next.

   Note: The Enrollments screen brings in the CRM User Management Framework. The default roles and responsibilities linked to the Self-Service Support Over the Web enrollment will be assigned to this user upon approval. See the topic, Seeded Self-Service Support Over the Web Enrollment, for default roles and responsibilities that are seeded by user type for this enrollment.

6. A confirmation message appears. Click Next.

Approval

1. Log in to the JTF login page as sysadmin.

   Note: It is possible to set up a user other than sysadmin to be the approver. Consult the *Oracle CRM Technology Foundation Implementation Guide* and the *Oracle CRM Technology Foundation Concepts and Procedures* for details.

2. Navigate to Users > Registration > Pending Approvals.
3. In the Request Summary screen, select the appropriate underlined username.
4. Fill in the mandatory information. Click Next.
5. Select the Accounts button. Choose the company account(s) to associate with the user. Select Next.
6. Enter any comments in the Comments area. Click Accept.

Verification

1. At the JTF login page, log in as the Primary User just created.
2. Verify that appropriate menus are displayed. The Primary User will have access to the following main tabs on the UI:
   - Home
   - Accounts (subtabs: Orders, Invoices, Payments, Contracts, Returns, Service Requests)
   - Products
   - Support (subtabs: Ask Me, View / Update Requests, Create Request, Call Me, Survey)
   - Forum
3. Under the Profile button, the Primary User will have access to the following links:

User Profile:

- Personal Profile
- Contact Points
- Addresses
- Preferences
- Accounts
- Support

Company Profile:

- Information
- Contact Points
- Addresses
- Administrators

4. Select the Administration button at the top of the screen. Verify that the Primary User can access the following administrator tabs:
   - User
   - Pending Approvals

5.6.4 Set up Employee User

This type of user is an employee of the merchant using Oracle *i*Support. This user is set up through the Forms interface and approved by the Oracle *i*Support Administrator or the Primary User for the Employee User's organization.

5.6.4.1 Steps to Set up Employee User

Follow the steps below to set up this user.

Prerequisite:

Employees have been defined using Oracle Human Resources Management System or another HR application. For Oracle HRMS documentation, refer to the following titles available on MetaLink:

- *Implementing Oracle HRMS*
- *Using Oracle HRMS - The Fundamentals*

- *Managing People Using Oracle HRMS*
- *Customizing, Reporting and System Administration in Oracle HRMS*
- *Managing Total Compensation Using Oracle HRMS*

Steps

1. Log into Oracle Forms application as sysadmin. Select System Administrator responsibility.
2. Navigate to Security > User > Define. The Users form appears.
3. Enter a Username for the user. For example, you could use the first initial and last name of the employee.
4. On the User form, associate the new username with an employee: Click in the Person field on the User form. Search for the employee by clicking on the LOV field [...}, entering a partial value and clicking Find. Select the employee by double-clicking on the employee name.
5. In the Password field, enter a password for the username. Use the Tab key to clear the Password field, and then re-enter the password to validate.
6. If desired, limit the number of days this password will be valid by entering a value in days in either the Accesses or Days fields. The user will be prompted to change this password after *x* number of days / accesses (where *x* represents the value you entered in the Days field or Accesses field). If you select None, the user will not be required to change the password.
7. In the Responsibility tab, click in the Responsibility field. Select the LOV {...} that displays and enter IBU% to query for IBU responsibilities.
8. Double-click the **IBU_EMPLOYEE_USER_RESP** responsibility.
9. Under Effective Dates, enter an the effective date in the From field. If desired, enter an end-date for the user in the To field. Leave the To field blank to create the user with no end-date.
10. Save and close the form.

Assign Role(s) and Default Responsibility

1. Log in to the JTF login page as Oracle *i*Support Administrator. Navigate to Administration > User.
2. Search for the user. Once you find the user, select the underlined hyperlink of the username. The Personal Profile page displays.

3. Select Roles. Assign **IBU_REG_USER** and **IBU_EMPLOYEE** to the employee.
4. Save your work.
5. Return to the Personal Profile page. Select Responsibilities and assign the **IBU_EMPLOYEE_USER_RESP** as the *default* responsibility for this user.
6. Save your work.

> **Note:** When setting up new users of the Install Base functionality, please add the role, CSI_END_USER, to them. This role contains the required permissions for Install Base general users.

Verification

1. At the JTF login page, log in as the user just created.
2. Verify that appropriate menus are displayed. The Employee User will have the following main tabs on the UI:
   - Home
   - Support (subtabs: Ask Me, View / Update Requests, and Create Request)
   - Forum
3. Under the Profile button, the Employee User will have access to the following links:

   User Profile:

   - Personal Profile
   - Contact Points
   - Addresses
   - Preferences
   - Accounts
   - Support

5.6.5 Set up Business (B2B) User

B2B (business users) are generally customers who have accounts on the merchant, and are no associated with the merchant's company. These users will select the Register Here link on the JTF login page to register.

5.6.5.1 Steps to Set up B2B User

Follow the steps below to set up this user.

Registration

1. Select the Register Here link on the JTF login. Or, have the user self-register using the Register Here link.
2. Select Business User from the list of User Types. Click Next.
3. Enter the company ID in the textbox and Submit. The company ID is a unique number assigned during company registration.
4. Enter required information on the User Registration form. **Make a note of the username and password.** Select Next. The Available Enrollments screen appears.
5. In the Enrollments screen, select Self-Service Support Over the Web and click Next. A confirmation message appears. Click Next.

> **Note:** When setting up new users of the Install Base functionality, please add the role, CSI_END_USER to them. This role contains the required permissions for Install Base general users.

Approval

1. Log in to the JTF login page as sysadmin. Navigate to Users > Registration > Pending Approvals.
2. In the Request Summary screen, select the appropriate underlined username.
3. Fill in the mandatory information. Click Next.
4. Select the Accounts button. Choose the company account(s) to associate with the user. Select Next.
5. Enter any comments in the Comments area. Click Accept.

Verification

1. At the JTF login page, log in as the user just created.
2. Verify that appropriate menus are displayed. The B2B User will have the following main tabs on the UI:
   - Home

- Accounts (subtabs: Orders, Invoices, Payments, Contracts, Returns, Service Requests)
- Products
- Support (subtabs: Ask Me, View / Update Requests, Create Request, Call Me, Survey)
- Forum

3. Under the Profile button, the B2B User will have access to the following links:

   User Profile:

   - Personal Profile
   - Contact Points
   - Addresses
   - Preferences
   - Accounts
   - Support

   Company Profile:

   - Information
   - Contact Points
   - Addresses
   - Administrators

5.6.6 Set up Individual (B2C) User

The B2C (individual users) is typically an individual person with no relationship to the organization using Oracle *i*Support. B2C users will normally be self-registering over the Internet, using the Register Here link on the JTF login page.

A B2C user's seeded approval process in the CRM User Management Framework is automatic. B2C users thus will be able to access the application immediately after registering, unless you set up a separate approval process. Consult the *Oracle CRM Technology Foundation Implementation Guide* for more details.

5.6.6.1 Steps to Set up B2C User

Follow the steps below to set up this user.

Registration

1. Select the Register Here link on the JTF login. In the list of available user types, select Individual User. Click Next.
2. Enter required information on the User Registration form. **Make a note of the username and password.** Select Submit. The Available Enrollments screen appears.
3. Select Self-Service Support Over the Web and click Next. A confirmation message appears.

Verification

1. At the JTF login page, log in as the user just created.
2. Verify that appropriate menus are displayed. The B2C User will have the following main tabs on the UI:
   - Home
   - Accounts (subtabs: Orders, Invoices, Payments, Contracts, Returns, Service Requests)
   - Products
   - Support (subtabs: Ask Me, View / Update Requests, Create Request, Call Me, Survey)
   - Forum
3. Under the Profile button, the Employee User will have access to the following links:

   User Profile:

   - Personal Profile
   - Contact Points
   - Addresses
   - Preferences
   - Accounts
   - Support

5.6.7 Set up Knowledge Management Administrator-User

This is an administrator-user who performs Oracle Knowledge Management setup and management. This user is required only if the merchant will use the Knowledge Management functionality. For more information, see the chapter in this guide, *Integrating Oracle iSupport with Oracle Knowledge Management*.

5.6.8 Set up Survey Administrator-User

This is a user who performs Surveys setup and management. This User Type is not seeded in the JTT user management framework. This user is required only if the merchant will use Surveys. For more information, see the Setting up iSupport Surveys topic of this chapter.

5.7 Setting up *i*Support Homepage

The Homepage is a work screen and the application landing page for the user. Here, users can store service request and knowledge base bookmarks, as well as receive system alerts and other data that the merchant chooses to display. Options for Homepage setup include:

- Use default settings shipped with the application (some basic setups are required).
- Add bins from a pre-defined selection that ships with the application.
- Add content from Oracle Marketing Encyclopedia System (MES).
- Disable content.
- Make content a required item (mandatory) on UI.
- Change display of mandatory content on UI.

Oracle *i*Support does not currently support custom bins based on PL/SQL procedures and/or Java objects. The sections that follow discuss Homepage options.

5.7.1 Add MES Content to Homepage

Oracle Marketing Encyclopedia System (MES) can supply the functionality to provide bin content on the Homepage. Examples include Alerts and Company News bins. You can also publish other types of information in MES and select it as Homepage content in Oracle *i*Support.

Prerequisites

- Set up MES.
- Publish content within MES.
- Run MES concurrent programs.
- Verify MES setup.

See *Oracle Marketing Encyclopedia System Implementation Guide* and *Oracle Marketing Encyclopedia System Concepts and Procedures* for details.

Steps

1. Log in to the JTF login screen as the Oracle *i*Support Administrator.
2. Navigate to Administration > Homepage > Content > Add MES Content (bottom of screen).
3. In the Add MES Content screen, the content you have published in MES will display. Select the content that you wish to add by activating the appropriate checkbox.
4. Select Save. The Content Administration screen appears.
5. Navigate to the Home tab on the general user UI to verify that the content displays on the page.

5.7.2 Understanding the Add/Update Content Page

The Add/Update Content page allows you to:

- Set content as mandatory.
- Disable existing content.

5.7.2.1 Setting Homepage Content as Mandatory

You can set information on the homepage as mandatory. Mandatory content has the following characteristics:

- Cannot be disabled by users.
- Always displays at the top of the column which it is in.
- Can be displayed as wide-format or narrow-format.

Follow the steps below to change content to mandatory and choose its layout.

Steps

1. Log in to the JTF login screen as the Oracle *i*Support Administrator.
2. Navigate to Administration > Homepage > Content. The Content Administration screen appears.
3. Select the underlined hyperlink of the content you wish to make mandatory. The Update Content screen appears.
4. In the Update Content screen, place a checkmark in the Mandatory checkbox.
5. Select Update.

5.7.2.2 Disabling Homepage Content

Follow the steps below to disable homepage content and make it inaccessible to all but the Oracle *i*Support Administrator.

Steps

1. Log in to the JTF login screen as the Oracle *i*Support Administrator.
2. Navigate to Administration > Homepage > Content. The Content Administration screen appears.
3. Select the underlined hyperlink of the content you wish to disable. The Update Content screen appears.
4. In the Update Content screen, place a checkmark in the Disable checkbox.
5. Select Update.

5.7.3 Changing Mandatory Bin Layout/Display

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

Steps

1. Log in to the JTF login screen as the Oracle *i*Support Administrator.
2. Navigate to Administration > Homepage > Content > Mandatory Layout.
3. Select and arrange content as desired, using the right (>) and left (<) arrow buttons to move content from two to three column layout.
4. To arrange content vertically in a column, select content and click the up or down arrow buttons to set the order.

5. Select Update to save changes.

5.7.4 Enabling Homepage Subscription E-Mails

The Subscription E-Mails feature of Oracle *i*Support allows users to receive Homepage content in e-mail form. This can be useful if a user is unable to access the Homepage for a period of time. Set up of this feature includes:

- Set up template.
- Run necessary concurrent programs.

Prerequisites

- The e-mail subscription feature must be activated for the user who is to receive the e-mails. Navigate to Profile > Support; select content and delivery days as desired.
- You must be running Oracle Workflow to enable this feature. For more information, refer to the chapter in this guide, *Integrating Oracle iSupport with Oracle Workflow.*

5.7.4.1 Setting up E-Mail Subscription Templates

Setting up the e-mail template allows you to control the framework for the e-mail that is delivered to a user.

Steps

1. Log in to the JTF login as Oracle *i*Support Administrator.
2. Navigate to Administration > Homepage > Subscription. The Subscription Template Administration screen displays.
3. In the Subject text field, enter the text to display as the subject of the e-mail that will be sent to the user.
4. In the Header and Footer fields, enter the information you wish to display in the header (top) and / or footer (bottom) area of the template.

   Use the Clue Word / Description table (copy and paste as desired) at the bottom of the screen to build the header and footer text.
5. Optionally, select Preview to see how the framework will appear to the user.
6. To save changes, select Update. A confirmation message displays.

5.7.4.2 Running Concurrent Programs

In Oracle (Forms) Applications, run the Notification Mailer and Message Delivery Scheduler concurrent programs. See *Oracle Applications Concepts Release 11i* for more information on running concurrent programs. For more information on Oracle Workflow, see the chapter in this guide, *Integrating Oracle iSupport with Oracle Workflow*. You should also consult the *Oracle Workflow User's Guide*.

5.8 Setting up CRM User Management Framework

The Oracle CRM User Management Framework consists of enrollments (subscription services), approval processes, registration templates, and user types. These components provide a flexible framework for user creation, approval, management, and information gathering.

The user management framework is an optional but recommended integration for your organization. While the framework will be installed automatically when you install CRM Foundation modules, there are some setups you will need to perform.

The information in this section is meant to give you an overview of the user management framework concepts. Consult the *Oracle CRM Technology Foundation Implementation Guide* and the *Oracle CRM Technology Foundation Concepts and Procedures* for more details.

5.8.1 Setting up Enrollments (Subscription Services)

Enrollments are application-specific subscription services at the user level. They reference the registration templates, roles, and responsibilities that are tied to user types. Enrollments are of two basic types:

- **Implicit** - Implicit enrollments are services that the user receives automatically during the registration process.
- **Explicit** - Explicit enrollments are services that users select during registration following their selection of user type.

One enrollment can equal:

- 0 or 1 responsibility - You can link no more than one responsibility to an enrollment.
- 0 or 1 template - You can link no more than one registration template to an enrollment.
- 0 or 1 workflow - You can link no more than one workflow process to an enrollment.

- 0 or more roles - You can link any number of roles to an enrollment.

5.8.1.1 Seeded Self-Service Support Over the Web Enrollment

The enrollment tied to Oracle *i*Support is called the Self-Service Support Over the Web Enrollment. It is seeded within the CRM User Management Framework.

The table below, Self-Service Support Over the Web Enrollment Responsibilities, lists seeded responsibilities and corresponding Oracle *i*Support user types for the Self-Service Support Over the Web Enrollment.

Table 5–1 Self-Service Support Over the Web Enrollment Responsibilities

Responsibility	Description
IBU_INDIVIDUAL USER_RESP	Individual User (B2C)
IBU_PRIMARY_USER_RESP	Primary User
IBU_BUSINESS_USER_RESP	Business User (B2B)

The table below, Self-Service Support Over the Web Enrollment Roles, lists seeded roles and corresponding Oracle *i*Support user types for the Self-Service Support Over the Web Enrollment.

Table 5–2 Self-Service Support Over the Web Enrollment Roles

Role	Description
IBU_REG_USER	Individual User (B2C) or Business User (B2B)
IBU_B2B_PRIMARY_USER_ MANAGEMENT and IBU_REG_USER	Primary User

5.8.1.2 Modifying Seeded Enrollments

The seeded enrollments can be modified, and you can also create new enrollments. Consult the *Oracle CRM Technology Foundation Implementation Guide* and the *Oracle CRM Technology Foundation Concepts and Procedures* for details.

5.8.2 Setting up Registration Templates

Applications require different pieces of information to register various user types. Registration of a sales representative might require the sales territory, while a consumer registration would need to include the credit card number. Registration

data is being stored in different tables - some is common data and is stored (mostly) in the Trading Community Architecture (TCA); the rest is stored into application-specific tables.

Registration templates, which can be one JSP or multiple pages, accommodate these information-gathering requirements. The registration pages rendered to a user will depend on the user type and the services / enrollments the user is subscribing to. Registration templates refer to JSP files that are used to capture the registration information that is particular to a User Type.

Characteristics of registration templates include:

- JSPs associated to a template handler to execute the logic on data captured through JSP pages
- Can be tied to enrollments
- Are set up by the application administrator during implementation
- Can consist of one page or many

5.8.2.1 Defining New Registration Templates

New registration templates can be created using the JTF sysadmin console. Consult the *Oracle CRM Technology Foundation Implementation Guide* and the *Oracle CRM Technology Foundation Concepts and Procedures* for details.

5.8.3 Setting up Approval Processes

Approval is a step in the registration process whereby users and / or their enrollments are confirmed by an approving authority. Once the approval process is completed, the system automatically grants the appropriate default role(s) and responsibility (based on User Type and / or Enrollments) that allow access to the application.

The approval process uses Oracle Workflow to track and route the request (via an e-mail message) to each approver set up in the approval definition. The e-mail informs the approvers of the request type (user type or enrollment) and what action is required.

5.8.3.1 Seeded JTF Approval Processes

User Type seeded approval processes are:

- **Individual User** - No approval required
- **Business User** - Approval notification sent to Primary User(s)

- **Primary User** - Approval notification sent to Oracle iSupport Administrator, or System Administrator

5.8.3.2 Who Can Be an Approver?

- **Request Owner** - This user is the current approver based on the approver list and current state of workflow defined for given approval. The Request Owner will only be able to approve the requests that are owned by him. This user should have JTF_APPROVER permission.
- **Oracle Applications System Administrator** (sysadmin) - The sysadmin will see and be able to approve all pending requests. Users who have the JTF_REG_APPROVAL permission are considered sysadmins. In Release 11.5.6, the Oracle *i*Support Administrator role (IBU_SYSTEM_ADMIN) has been given the JTF_REG_APPROVAL permission.
- **Oracle *i*Support Administrator** - The Oracle *i*Support Administrator will see a list of pending approvals. Users who have the IBU_SYSTEM_ADMIN role are considered to be the Oracle *i*Support Administrator.
- **Primary User** - This user will be able to view and approve the requests which are assigned to the Primary User role, as well as the requests owned by the Primary User. The requests assigned to the Primary User role will be filtered based on the current approver's organization. Primary Users need the JTF_PRIMARY_USER_SUMMARY role to view the pending requests page showing their list of users waiting approval. Requests assigned to the Primary User role are identified by the JTF_PRIMARY_USER profile option which should be set to a predetermined username or an FND dummy user. The name used for the Primary User Role needs to be in the approval hierarchy if the primary user is needed for approval.

5.8.3.3 Defining a New Approval Process

New approval processes can be defined on the JTF sysadmin console. Consult the *Oracle CRM Technology Foundation Implementation Guide* and the *Oracle CRM Technology Foundation Concepts and Procedures* for details.

5.9 Setting up Service Request

See the chapter, *Integrating Oracle iSupport with Service Request*.

5.10 Setting up Products and Returns Applications

See the chapter in this guide, *Integrating Oracle iSupport with Products and Returns.*

5.11 Setting up Knowledge Base Applications

The following Oracle knowledge base applications integrate with Oracle *i*Support:

- Oracle Knowledge Management
- Oracle Marketing Encyclopedia System (MES)

  MES is also known as the Technical Library.

5.11.1 Setting up Knowledge Management

Set up Oracle Knowledge Management. See the chapter in this guide, *Integrating Oracle iSupport with Oracle Knowledge Management*.

5.11.2 Setting up Marketing Encyclopedia System

Oracle Marketing Encyclopedia System (MES) is required for technical library functionality in Oracle *i*Support. It also supplies the Alerts bin content. Refer to *Marketing Encyclopedia System Implementation Guide* for setup details.

5.12 Setting up *i*Support Forums

The sections below details steps for setting up Oracle *i*Support interactive forums.

5.12.1 Creating Categories

Categories help to organize forums into topic areas. Oracle *i*Support allows you to set up as many categories as you wish. The steps below describe how to create a category.

Steps

1. At the JTF login, log in as the Oracle *i*Support Administrator.
2. Navigate to Administration > Forum > Category > Create. The Create New Category screen displays.
3. You can choose to have the category exist at the topmost (root) level, or you can structure the category to be a sub-category of another category.

Of course, the very first category that you create will be at the Category Root level. Thus, for the first one, leave the Choose a parent category field set to Category Root.

Guidelines for creating additional categories:

- Leave the drop-down menu set to Root to create a category at the top-most level.
- Select the parent category to create a sub-category within a category.

4. Enter a name for the Category in the Enter the name of the new category field.
5. Select an Access Type. Access type determines who can view the category on the UI. Access options are:

   Open - All users can view / access.

   Restrict - Only members of a usergroup can view / access. For more information, see Restricting Access to Categories or Forums.

   Close - This option closes the category or forum to all users except the Oracle *i*Support administrator. It can be utilized as a temporary state for a category or forum while the administrator is performing maintenance or setup tasks relating to the category or forum. It can also be used to permanently disable a category or forum.
6. Select Create. Respond to the confirmation message.

5.12.2 Creating Forums

Forums are focussed topic areas within broader categories. There is no limit to the number of forums you can create within any given category or sub-category. Follow the steps below to create a forum.

Steps

1. At the JTF login, log in as the Oracle *i*Support Administrator.
2. Navigate to Administration > Forum > Forum > Create. The Create New Forum screen displays.
3. From the drop-down list, select the category within which you wish the forum to reside.
4. Enter a name for the forum in the Enter forum name field.
5. Select an Access Type:

Open - All users can view / access.

Restrict - Only members of a usergroup can view / access. For more information, see Restricting Access to Categories or Forums.

Close - This option closes the category or forum to all users except the Oracle *i*Support administrator. It can be utilized as a temporary state for a category or forum while the administrator is performing maintenance or setup tasks relating to the category or forum. It can also be used to permanently disable a category or forum.

6. Select Create. Respond to the confirmation message.

5.12.3 Restricting Access to Categories or Forums

In Oracle *i*Support, the administrator has the ability to create categories and forums that only members of a usergroup can view and access.

Note: Restricted categories and forums will not display to users who are not members of the usergroup associated with the restricted category / forum. You should inform users of the existence and nature of restricted areas so that they can request inclusion in them, if appropriate.

5.12.3.1 Set Restricted Access on Category or Forum

Use the procedures below to set the Access Type of Restricted on a category or forum.

Prerequisite

A category or forum has been created.

Steps

1. Log in to the JTF login screen as the Oracle *i*Support Administrator.
2. Navigate to the Forum tab.
3. To change the access type of a category, navigate to Category > Modify Status. To change the access type of a forum, navigate to Forum > Modify Status. The Modify Access Status page displays for either forums or categories.

4. In the Modify Access Status page, select the category or forum you wish to restrict.
5. In the Choose access type area, select the Restricted radio button.
6. Select **Next** or **Modify**, depending upon which button appears. Respond to the confirmation message.

5.12.3.2 Create Usergroup

Follow the steps below to set up a usergroup to associate with the restricted category or forum. Only the usernames that are associated with the usergroup will be able to view the category or forum.

Steps

1. Log in to the JTF login screen as the Oracle *i*Support Administrator.
2. Navigate to Administration > Support > Usergroup > Create.
3. Enter a unique name for the usergroup in the Name field.
4. Select a effective date for the usergroup using the Start Date calendar icon.
5. Select an ending date for the usergroup using the End Date calendar icon.

   You can also end date a usergroup to disable it.
6. Enter a brief description for the usergroup in the Description text field.
7. In the SQL statement field, enter an appropriate SQL statement.

   Sample SQL Usergroup Select Statement

   ```
   select EMPLOYEE_ID from FND_USER where EMPLOYEE_ID > 0
   ```

   This select statement retrieves all employee IDs greater than zero (i.e., all employees) from the fnd_user table.

   Note: Usergroup select statements support PARTY_ID and EMPLOYEE_ID, but not USER_ID.
8. Select Save.

5.12.3.3 Running Usergroup Creation Program

To populate necessary tables in the database, run the concurrent program Usergroup Creation Program (short name is IBUUG). This concurrent program must be run each time you update or add users to a usergroup.

5.12.3.4 Associate Usergroup to Restricted Category/Forum

Follow the steps below to associate a usergroup with a restricted category or forum.

Prerequisites

- A restricted category or forum has been created.
- A usergroup has been created.
- The usergroup creation concurrent program has been run.

Steps

1. At the JTF login, log in as the Oracle *i*Support Administrator.
2. Navigate to Administration > Forum > Usergroup > Associate.
3. Choose a category or forum from the drop-down list.
4. Select a Usergroup to associate with the Forum.
5. Select Associate.
6. A confirmation screen appears.

5.12.4 Creating Forum Moderators

A Forum Moderator is a user designated to handle specific administrative tasks for message threads (groups of related messages).

Forum moderators can:

- Change the status (open or closed) of a message thread
- Change the distribution (public or internal) of a message thread - internal threads can only be viewed by employee users
- Delete message threads

Forum moderators cannot:

- Change access type of a category or forum
- Set up usergroups for restricted categories or forums
- Create forums or categories
- Move message threads from one forum to another

Steps for creating forum moderators are below. See the *Oracle iSupport Concepts and Procedures* for more information on typical forum moderator tasks.

Steps

1. Log in to the JTF login screen as the Oracle *i*Support Administrator.
2. Navigate to Administration > Forum > Forum > Modify Attributes.
3. From the drop-down list, select a Forum where you wish to add a Moderator.
4. Select Next. The Modify Forum Attributes screen displays.
5. Select the Add button under Moderator List area. The Add Moderator screen appears.
6. Enter the name of the user who will be the Forum moderator.

   If necessary, search for the user:

   a. Enter partial search criteria, using % as a wildcard

   b. Select the radio button next to the appropriate username
7. After you have entered the appropriate name in the textbox, select Add. A confirmation message displays.

5.13 Setting up *i*Support Surveys

The Surveys functionality of Oracle *i*Support allows you to survey usergroups on topics of your choice. Surveys require you to set up Oracle Scripting. Follow the steps below to implement Surveys.

5.13.1 Setting up Oracle Scripting

Oracle Scripting presents scripted messages which guide interaction center agents through their interactions with customers. With the 11.5.6 release of Scripting, Oracle introduced the survey component of Scripting, called iSurvey. Through the Scripting Survey component, enterprises can create, manage, and report on surveys to evaluate customer satisfaction, gain customer input on new initiatives, and gain other feedback from survey respondents. Oracle Scripting is one application module of Oracle's Interaction Center Suite of Applications.

Oracle Scripting consists of the following components:

- **Scripting Engine** - The simple graphical user interface that displays a script at an agent's workstation via a browser or within an Oracle Form.
- **Scripting Author** - A script and survey development studio which is downloaded to a user’s workstation. Scripting Author uses visual layouts to

allow a script developer to create, modify, and deploy scripts for agents at the interaction center.

- **Survey Component** - An HTML user interface providing web-based surveys that can be deployed on the Internet, via email messages or direct links on enterprise web sites. The survey component contains all the tools needed to manage lists, set up survey campaigns, and provide result information.

Set up Oracle Scripting according to the *Oracle Scripting Implementation Guide*.

5.13.2 Create Surveys in Oracle Scripting

Oracle *i*Support uses only the non-list-based types of surveys.

Create scripts in Oracle Scripting according to the steps and guidelines documented in the *Oracle Scripting Implementation Guide* and *Oracle Scripting Concepts and Procedures*.

5.13.3 Assign Survey Administrator Responsibility to an *i*Support User

Assign the responsibility, Survey Administrator, to either an existing Oracle *i*Support user (such as the Oracle *i*Support Administrator), or to a special user created just for this purpose. See the *Implementation Tasks* chapter of this guide, Setting up iSupport Users section, for details on how to set up users.

Steps

1. Log into Oracle *i*Support as the Oracle *i*Support Administrator.
2. Select Administration > User. Search for the user who will be the Survey Administrator, whether this is you as the Oracle *i*Support Administrator or another user. Select the underlined hyperlink of the username.
3. In the User Details Screen, select Responsibilities.
4. In the Responsibilities screen, select the underlined hyperlink of the word, `Select`. A list of responsibilities appears. If necessary, search for the Survey Administrator responsibility. Once found, select the Survey Administrator responsibility.

   Note: Do not set the Survey Administrator responsibility as the default unless you wish to force the user to log into iSurvey the next time the user logs in to the HTML JTF login.
5. Save your work.

5.13.4 Set up *i*Support Survey in iSurvey

Surveys have three parts:

- **Header** - this is the header area of the survey
- **Error** - this is the error page that is displayed when an error occurs during the survey
- **Final** - this is the final page displayed to the user after the survey is complete

All of these parts you create as JSPs in the steps outlined in this section.

Follow the steps below to set up Surveys in the Oracle iSurvey module.

Steps

1. Log in to the JTF login page as the user with Survey Administrator responsibility.

   If you are already in Oracle *i*Support, you can change current responsibility: Navigate to Profile > Preferences and select the Survey Administrator responsibility from the Current Responsibility LOV on the General Preferences page. Select Update.

2. Navigate to Survey Campaign > Survey Resources. In the Resources screen, click on the Create button.

3. In the Create Resource screen, create a Header page, a Final page, and an Error page according to the steps and guidelines documented in the *Oracle Scripting Concepts and Procedures*, with the following exception:

   - Be sure to enter **`ibupfbgl.jsp`** in the File Name field for the Final page file. This is the Oracle *i*Support JSP which lists the surveys you set up.

4. Navigate to Survey Campaign > Survey Campaign.Click on the Create button.

5. In the Create Survey screen, select the appropriate script using the Go button and the % as a wildcard.

6. Continue creating the survey by following the steps and guidelines documented in the *Oracle Scripting Concepts and Procedures*, with the following exception:

   - For the Final page field, using the Go button, select the resource, **Oracle iSupport JSP** (ibupfbgl.jsp), created in step 3 above.

7. Select Create to save the survey.

8. Navigate to Survey Campaign > Cycle and set up a cycle to associate with the survey by following the steps and guidelines documented in the *Oracle Scripting Concepts and Procedures*.
9. Navigate to Survey Campaign > Deployment and create a deployment for the survey by following the steps and guidelines documented in the *Oracle Scripting Concepts and Procedures*.
10. Deploy the survey by clicking on the Deploy button.Oracle *i*Support will only display surveys which have the status of Active and whose dates fall within current dates. See the *Oracle Scripting Concepts and Procedures* for additional information.

5.13.5 Make Survey Available in *i*Support

After you have created the survey in iSurvey, you need to select it in Oracle *i*Support and then associate a usergroup(s) to the survey. Follow the steps below to activate the survey in Oracle *i*Support. This section contains three parts:

- Set up usergroup.
- Run Usergroup Creation concurrent program.
- Select Survey and Usergroup in iSupport.

5.13.5.1 Set up Usergroup

Follow the steps below to set up a usergroup to associate with any surveys you have created in iSurvey. Only the usernames that are associated with the usergroup(s) selected will be able to view the surveys you have created.

Steps

1. Log in to the JTF login screen as the Oracle *i*Support Administrator.
2. Navigate to Administration > Support > Usergroup > Create.
3. Enter a unique name for the usergroup in the Name field.
4. Select a effective date for the usergroup using the Start Date calendar icon.
5. Select an ending date for the usergroup using the End Date calendar icon.

   You can also end date a usergroup to disable it.
6. Enter a brief description for the usergroup in the Description text field.
7. In the SQL statement field, enter an appropriate SQL statement.

Sample SQL Usergroup Select Statement

```
select EMPLOYEE_ID from FND_USER where EMPLOYEE_ID > 0
```

This select statement retrieves all employee IDs greater than zero (i.e., all employees) from the fnd_user table.

Note: Usergroup select statements support PARTY_ID and EMPLOYEE_ID, but not USER_ID.

8. Select Save.

5.13.5.2 Run Usergroup Creation Concurrent Program

To populate necessary tables in the database, run the concurrent program Usergroup Creation Program (short name is IBUUG). This concurrent program must be run each time you update or add users to a usergroup.

5.13.5.3 Select Survey and Usergroup to Associate to Survey

Use the following steps to associate the usergroup(s) with surveys that you have created in iSurvey. Only members of the usergroup(s) will be able to view and respond to surveys.

1. Log into Oracle *i*Support as the Oracle *i*Support Administrator.
2. Navigate to Administration > Support > Survey. Click on the Add New Survey button. The Survey Detail screen will display with a drop-list of active surveys.
3. Select the desired survey from the drop-list, and then select a usergroup(s) to associate with the survey, by clicking on one or more of the checkboxes.
4. Select Create to save the changes.
5. To take the created survey(s), log into Oracle *i*Support as a member of a usergroup associated with a survey, and navigate to Support > Survey.

5.13.6 View Survey Results

iSurvey allows you to view the results of your surveys. The following steps can assist you in retrieving survey results. For complete information, refer to the *Oracle Scripting Implementation Guide* and the *Oracle Scripting Concepts and Procedures*.

Steps

1. Log in to iSurvey as a user with Survey Administrator responsibility.

From iSupport, to switch current responsibility, select the Profile > Preferences menu to switch current responsibility to the Survey Administrator responsibility. You must select the Update button to save changes.

2. In iSurvey, navigate to Response > Survey. Follow the steps and guidelines documented in the *Oracle Scripting Concepts and Procedures* to view and manage your survey results.

5.14 Setting up *i*Support Web Call-Back

The Web Call-Back (Call Me) feature allows users to submit a call-back request via the Oracle *i*Support UI. The web call-back requires implementation of:

- CRM Interaction Center (formerly Call Center Technology - CCT) suite
- Oracle Universal Work Queue (UWQ)
- Oracle Customer Care
- Oracle CRM Foundation, Notes module

The purchase of call center hardware also is required.

This section provides an overview of the call-back functionality in Oracle *i*Support. For more information, consult the CRM Interaction Center documentation available on MetaLink.

Outside of Oracle *i*Support, the call routing process is essentially this: Once the call-back entry is made by the user, Oracle *i*Support sends the request to the CCT server group specified by the Oracle *i*Support Administrator on the Oracle *i*Support UI. The CCT applications and hardware route the request to the UWQ server. The UWQ server decodes the customer information (the Notes module captures comments from user) and assigns it to the UWQ client, and the call request immediately pops up in an agent's screen in Oracle Customer Care.

There are very few setups required in Oracle *i*Support once the dependencies listed above are installed and functioning properly. Oracle *i*Support simply calls one of the CCT APIs to provide the list of available call center server groups that appear the Oracle *i*Support UI.

Refer to Oracle CRM Interaction Center documentation for information on setting up the underlying products which enable the Web Call-Back functionality in Oracle *i*Support.

Once the CCT and UWQ applications and call center hardware are installed and implemented, then you may use the steps below to set up Call Me in Oracle *i*Support.

Steps

1. Log into Oracle *i*Support as the Oracle *i*Support Administrator.
2. Navigate to Support > Call Me.
3. In the Call Me Administration screen, select a call center server group from the drop-list.
4. Select Update to save the data.

5.15 Setting up Contracts Applications

Set up and / or confirm the setup of Oracle Contracts Core and Oracle Service Contracts.

There are no contracts setups specific to Oracle *i*Support. See the following documentation for setup information:

- *Oracle Contracts Core Concepts and Procedures*
- *Oracle Contracts for Service Concepts and Procedures*

5.16 Setting up Customer Care

Set up and / or confirm the setup of Oracle Customer Care. Refer to *Oracle Customer Care Implementation Guide*.

5.17 Verifying the Implementation

Refer to *Verifying the Implementation* chapter of this guide.

6

Verifying the Implementation

This chapter contains steps to verify the successful implementation of Oracle *i*Support 11*i* (11.5.6). Topics include:

6.1 Implementation Verification Overview

Following are brief guidelines to verify the successful installation of the major functional areas of Oracle *i*Support.

You will be using both administrator and regular user screens during the verification process. However, all of the verification tasks below assume you will log in as a regular user, unless otherwise noted.

Help with performing the general user or administrator steps described in this chapter can be found in the *Oracle iSupport Concepts and Procedures* (available in PDF and online). Some of the steps also are in the *Implementation Tasks* chapter of this guide.

For additional help with implementation, contact Support via Oracle MetaLink (http://metalink.oracle.com). MetaLink provides support and technical information relating to Oracle *i*Support, as well as all Oracle products.

6.2 Verifying Homepage Implementation

Verify that you have set up the Oracle *i*Support Homepage.

- As Oracle *i*Support Administrator, select content for the Homepage.
- As Oracle *i*Support Administrator, change the layout of Homepage content and verify that the changes can be seen on the Homepage.
- As Oracle *i*Support Administrator, make some content mandatory on the Homepage, and then log in as a non-administrative user and attempt to disable it.
- As Oracle *i*Support Administrator, sign up for Homepage e-mail subscription feature and verify that you receive the contents in an e-mail.
- Log in as a non-administrative user. Verify that you can view Homepage content set up by the administrator.
- Log in as a non-administrative user. Verify that you can edit:
  - Service Request Quick Links bin
  - Service Request (saved views) bin
  - Quick Links bin

References: Setting up iSupport Homepage in the *Implementation Tasks* chapter of this guide.

6.3 Verifying User Setups

Verify that you can create the iSupport users and that you can log in as these users.

- Create an Individual (B2C) User.
- Create a Business (B2B) User.
- Create a Primary User.
- Create an Employee User.
- Log in to Oracle *i*Support as the users created. Verify that they can access the application and that their menu setups are as described in the Setting up iSupport Users section.

References:

- Setting up iSupport Users in the *Implementation Tasks* chapter of this guide

- CRM User Management Framework documentation (available online)

6.4 Verifying Service Request Implementation

Verify that you have set up service request functionality in Oracle *i*Support.

- Create a service request. Verify that you can attach files to the service request. Try attaching different types of files (.gif, .htm, .doc, etc.)
- If you are integrating service request with Oracle Workflow, select the Email this to me button on the service request confirmation page and verify that the e-mail reaches you.
- Close the service request. Verify that you can re-open it.
  - Wait until the Re-open closed service request time limit (set in the service request default settings) has expired, and then verify that you cannot re-open the service request.
- If you have set up Products applications, verify that you can attach a product to a service request.
  - As administrator, set service request defaults to enforce product selection, then verify that a regular user is required to select a product while creating a service request.
- If you have set up Oracle Knowledge Management, verify that you can search the solution repository while creating a service request.
  - As administrator, set service request defaults to enforce knowledge base search, then verify that a regular user is required to search the knowledge base while creating a service request.

References:

- *Integrating Oracle iSupport with Service Request* chapter of this guide
- *Integrating Oracle iSupport with Oracle Knowledge Management* chapter of this guide.
- Oracle Support (TeleService) documentation
- *Integrating Oracle iSupport with Products and Returns*

6.5 Verifying Products/Returns Integration

Verify that you have set up the dependent products and returns applications.

6.5.0.1 Products (Products tab)

Verify the following:

- As a non-administrative user, navigate to the Products tab. Verify that you can search and view products in the Install Base.
- As a non-administrative user, verify that you can add products to the Install Base.

References:

- *Integrating Oracle iSupport with Products and Returns* chapter in this guide
- *Oracle Install Base Implementation Guide*
- Oracle Inventory documentation

6.5.0.2 Returns (Accounts tab)

- Log in as a non-administrative user and verify that you can create a return and receive an RMA number.

6.5.0.3 Account Management (Accounts tab)

- Book an order in Order Management, ship it, and make a payment against it. Verify that you can view order under the Orders subtab.
- Verify that you can see the shipment details for the order.
- Verify that you can view the invoice associated with the order under the Invoices tab.
- Verify that you can view the payment details associated with the order under the Payments subtab.
- If you have set up Contracts applications, create a contract in Contracts Core. Verify that you can you view the contract under the Contracts subtab.

References:

- *Integrating Oracle iSupport with Products and Returns* chapter in this guide
- Oracle Contracts documentation
- Oracle Accounts Receivable and other financial products documentation

6.6 Verifying Forums Implementation

Verify the setup of the Forums functionality.

- As a non-administrative user, verify that you can view forums.
- As a non-administrative user, verify that you can subscribe to forums.
- As a non-administrative user, verify that you can select a forum message and post a reply that then shows up in the forum.
- As Oracle *i*Support Administrator, verify that you can create categories.
- As Oracle *i*Support Administrator, verify that you can create forums.
- As Oracle *i*Support Administrator, verify that you can create a forum moderator.
- As a forum moderator, verify that you can perform the forum moderator tasks listed in the Creating Forum Moderators section of the Implementation Tasks chapter.

References:

- Setting up iSupport Forums in the *Implementation Tasks* chapter in this guide

6.7 Verifying Knowledge Management Implementation

The following are the verification steps for using Oracle Knowledge Management module:

1. Verify that you have assigned CS_System_Admin role to the user and assigned CS_KB_Sys_Admin responsibility.
2. Verify that you can perform the following steps:
    1. Create, view, and update a Solution Type.
    2. Create, view, and update a Statement Type.
    3. Associate, and disassociate a Statement Type to a Solution Type.
    4. Relate Statement Types to External Links.
    5. Create and modify Categories.
    6. Create a new authoring flow, and edit an existing flow.
    7. Create a Solution.

8. Create a Statement, add Attachments, and add Comments.
9. View and search Work Pending Solutions.
10. Accept or reject a solution in the workflow.
11. Run Concurrent Programs.

3. Verify that you can perform the following steps:
    1. Add or update frequently used definitions for solutions.
    2. Set up recommended solutions.
4. Verify that you can perform the following steps:
    1. Basic Search
    2. Advanced Search
    3. Searching for a Statement

References:

Integrating Oracle iSupport with Oracle Knowledge Management chapter of this guide.

7

Integrating Oracle iSupport with Service Request

Oracle *i*Support features the ability to create, update, and track service requests. It does this through integration with Oracle Support, also known as Oracle TeleService. The service request feature of Oracle *i*Support also includes optional product selection / association, knowledge management queries, and e-mail submission of service request details.

Topics in this chapter include:

7.1 Overview of Service Request Functionality in Oracle iSupport

The main features of service request functionality in Oracle *i*Support are:

- Customizable templates for gathering information from users during request creation.
- Enforceable or optional knowledge base search during request creation.
- Enforceable or optional product selection during request creation.
- Customer ability to re-open a closed request. Administrator ability to set a time limit on re-opening a closed request.
- Customer ability to update an existing request by adding notes, attachments, or re-opening within a specific timeframe.
- Delivery of submitted service request information to users via e-mail.

7.2 Overview of Dependencies

Oracle Support, also known as Oracle TeleService, provides the bulk of the service request functionality in Oracle *i*Support. Oracle Support tracks all service issues reported by customers and employees of the merchant. It does this via agent and customer input and integration with other Oracle applications.

In addition to the dependency upon Oracle Support, other service request functionality within Oracle *i*Support may be highly dependent upon additional applications, depending upon the features you elect to implement. These other applications include:

- Oracle Workflow for processing e-mails.
- Oracle Inventory and Install Base for products data.
- The following CRM Application Foundation modules:

  Assignment Manager (Assignment Engine) - Manager is required for service request functionality in Oracle *i*Support and Oracle Support. Oracle *i*Support calls the assignment manager to determine the owner (resource) of a service request. Who the assignment engine picks as the owner is dependent upon: request type, severity, urgency, status, problem code, product, and answers to template questions. If the assignment engine is unable to find an appropriate owner, the system picks the default resource and resource type configured in the profile options.

  Notes - The Notes module is required for service request functionality in Oracle *i*Support and Oracle Support. Service request processes use notes to capture data during creation and update. Administrators must set up note types and map them to Oracle *i*Support.

Resource Manager - The Resources module is optional for service request functionality in Oracle *i*Support, unless you are going to set up and use Resources as owners of service requests.

Territory Manager - Territory Manager is optional for service request functionality in Oracle *i*Support.Territory Manager allows you to define rules in Assignment Manager.

Task Manager - The Tasks module is optional for service request functionality in Oracle *i*Support, unless you are going to assign Tasks based on service request activity. Tasks allows you to create and assign work items to Resources. You create tasks, for example, to call back a customer or dispatch a service engineer to the customer site to fix a problem. A task may be assigned to an individual employee, a team, or a group.

7.3 Overview of Setup Steps

In order to use the service request functionality of Oracle *i*Support, you must:

- Set up the Oracle Support application which supplies the base functionality. See Setting up Oracle Support.
- Set up the CRM Foundation Notes module which allows the capture of textual information in service request functionality. See Setting up Oracle CRM Foundation Notes.

In addition to setting up the basic functionality, you can choose to implement additional, optional functionality, including:

- Products integration (see Setting up Products).
- Knowledge base integration (see Knowledge Management in iSupport Service Request).
- E-mail of service request data to users (see Setting up E-Mail Submission of Service Request Details).

7.4 Setting up Oracle Support

The following sections provide abbreviated details of the Oracle Support setups required for service request functionality in Oracle *i*Support. For additional information, consult the *Oracle Support Implementation Guide*.

7.4.0.1 Define Service Request Status Codes

Service request status codes indicate the current state of a service request. In the most generic sense, the status of a service request can only be open or closed. Statuses default to open unless the Closed checkbox is enabled during setup.

Within the open type, you can define any number of statuses that mean open, and within the closed type status, you can define any number of statuses that mean closed. Since service requests can be re-opened, you may also wish to define a closed status that means permanently closed. Oracle Support ships with a limited number of seeded status codes, but you will want to define your own to increase service request flexibility.

Examples of status codes are: Assignment / Dispatch Complete, Cancelled by User, Engineer On-Site, Open, Closed, Resolution in Progress, and Permanently Closed.

In addition, it is important that you define status code transition rules to control the use and display of status codes. See Define Status Code Transitions for details.

See the latest version of *Oracle Support Implementation Guide* for additional setup details.

7.4.0.2 Define Status Code Transition Rules

Status code transition rules help control the use of status codes in the following ways:

- Enables you to limit the status values that are allowable based on user responsibilities. If you do not define transition rules for status codes, then all status codes will be displayed to all users.source:
- Allow users to change statuses based on rules, i.e., open -> working or closed, working -> closed, and closed -> open. Note that a status cannot go from working back to open.

The steps below can assist you in setting up transition rules for Oracle *i*Support. Consult the *Oracle Support Implementation Guide* for more information on status code transition rules.

Prerequisite

- Status Codes have been set up.

Steps

1. Log into Oracle Forms as sysadmin. Select the Customer Support responsibility.

2. Navigate to Setup > Service Request > Request Status. The Service Request Statuses window displays with a list of all statuses that have been defined.
3. Select the Transitions button in the lower right-hand corner of the window. The Status Transitions window displays.
4. In the Application field, select iSupport using the popup LOV.
5. Enter a name for the transition rule in the Rule Name field.
6. Place the cursor in the Current State field and activate the popup LOV (...). Select a service request status from the Initial States window.
7. Place the cursor in the Next State field and activate the popup LOV. Select a status from the Final States window.
8. Continue pairing Initial and Final states as desired.
9. Save your work by selecting File > Save, or press the Save icon on the toolbar.
10. Select the Responsibility tab. Select a responsibility to map to the transition rule defined above.
11. Save your changes.
12. Enter additional responsibilities to map to transition rules, if desired.
13. Select Ok to save, and close the form.

7.4.0.3 Set up Service Request Types

Service request types categorize service requests and remain dynamic according to the state of the service request. For each service request type, you can set up a corresponding service request status or statuses. Additionally, each type can be linked to an Oracle Workflow process that can be automatically launched when the service request is created, or manually launched in the service request screen in Oracle Support. Service Request Type is a mandatory field in any service request.

You can also associate a service request type with a business process. Business processes are defined in Oracle Install Base and are used in generating charges for service requests.

The types you set up in the Forms application populate the customer LOV in Oracle *i*Support. Typical types might be: Technical Problem, Installation Request, or Information Inquiry.

Prerequisites to Setting up Service Request Types

- Set up your Status Codes.

- Define business processes in Oracle Install Base if you are going to use business processes. See the *Oracle Install Base Implementation Guide* for details.
- Define workflow processes in Oracle Workflow if you are going to associate a workflow with a service request type. See *Oracle Workflow Implementation Guide* for details.

For more information on setting up Service Request Types, see the *Oracle Support Implementation Guide.*

7.4.0.4 Set up Service Request Severities

Service request severities indicate the agent's perception of the reported service request. The severities you set here populate the LOVs on the Service Request Defaults setup screen in Oracle *i*Support. Severity is a mandatory field in all service requests. Typical severities include: High, Medium, and Low.

Prerequisite

If you are using Oracle Quality Online, defect severity must be defined in that application if you wish to associate a service request severity with a defect severity. See the *Oracle Quality Online Implementation Guide* and the *Oracle Support Implementation Guide* for additional details.

For more information on setting up service request severities, see the *Oracle Support Implementation Guide.*

7.4.0.5 Set up Service Request Urgencies

Service request urgencies indicate the customer's perception of the reported Service Request. The urgencies you set here populate the LOVs on the Service Request Defaults setup screen in Oracle *i*Support, and will populate the Urgency LOV that the customer selects from when creating a service request. Urgency is an optional field in the Oracle Support application, but is required in Oracle *i*Support.

Typical urgencies include: Inoperable, Partially Operable, and Not Urgent.

For more information on setting up service request urgencies, see the *Oracle Support Implementation Guide.*

7.4.0.6 Set up Service Request Problem Codes

Service request problem codes can further isolate the reason for a service request. Problem codes are user-subjective and are not required in the service request. The problem codes you setup here populate the customer LOV in Oracle *i*Support.

Some sample problem codes include: Network Incident, Electrical Problem, and Usability Issue.

For more information on setting up Service Request Problem Codes, see the *Oracle Support Implementation Guide.*

7.4.0.7 Set up Service Request Resolution Codes

Service request resolution codes describe how a service request issue was resolved. It is optional to set up Resolution Codes. Some sample resolution codes include: Servers Rebooted, Unit Replaced, and Patch Sent.

For more information on setting up service request resolution codes, see the *Oracle Support Implementation Guide.*

7.4.0.8 Set up Oracle Support Profile Options

For information on setting up Oracle Support profile options, see the *Oracle Support Implementation Guide.*

7.5 Setting up Oracle CRM Foundation Notes

The Notes module of Oracle CRM Foundation enables the entire CRM suite to create, maintain, and share notes related to customers, opportunities, service requests, and other business objects. Notes allows the capture of extensive, textual, project relevant information within Oracle CRM applications. Notes comes seeded with predefined note types which you can use, or you can define new note types of your own.

See the *Oracle CRM Foundation Implementation Guide* for more information.

7.5.1 Set Note Types as Public to View in iSupport

In order for a Note to be viewed in Oracle *i*Support, it must be specified as public.

7.5.2 Restrict Note Types Viewed in iSupport

Since note types are used across Oracle CRM products, it is important to restrict the note types that can be viewed in Oracle *i*Support. If you do not do this, all note types used across CRM applications will be displayed in the service request default settings page in Oracle *i*Support.

Prerequisite

- Note types have been set up.

Steps

1. Log on to Oracle Forms as sysadmin and select the Customer Support responsibility.
2. Navigate to Setup > Notes > Source and Note Type Mapping. The Mapping Objects window displays.
3. Find the Source Object *Public Service Requests*:
   a. Enter Query mode (F11).
   b. Enter Public Service Requests in Source Object field.
   c. Execute the query (Ctrl + F11).
4. Ensure that the note types you are using are mapped to iSupport in the Application column.

For more information on setting up Notes, see the *Oracle CRM Application Foundation Implementation Guide*.

7.6 Setting up Service Request in iSupport

This section outlines the service request setups that are specific to Oracle *i*Support. Topics include:

- Set up iSupport Service Request Profile Options
- Set up Service Request Defaults
- Set up Service Request Templates

7.6.1 Set up iSupport Service Request Profile Options

There are profile options that control the user of some service request functionality in Oracle *i*Support. See the appendix, *Profile Options*, for details.

7.6.2 Set up Service Request Defaults

In the Request Management screen, Oracle *i*Support administrators can control the following service request default settings:

- List of Values defaults in the Create Service Request screen

- Enforcing knowledge base search
- Enforcing product association with a service request
- Setting the time limit for re-opening a closed service request
- Default note types used for various service request processes
- Default owners of service requests.

Use the steps below to set service request defaults.

Prerequisites

- Oracle Support / TeleService has been installed and configured. See *Oracle Support Implementation Guide* for details.

Steps

1. At the JTF login, log in as the Oracle *i*Support Administrator.
2. Navigate to Administration > Support > Request Management > General. The Request Management Administration screen displays.
3. In the Request Management Administration screen, set defaults for the following:
   - **Default Severity** - Default Severity for new Service Requests.
   - **Default Status** - Set a Default Status for new Service Requests. The Default Status is the status assigned to the Service Request at creation.
   - **Closed Status** - From the Closed Status list, set a default for closed Service Request.
   - **Default Create Notetype** - Set a default for the notetype used when a Service Request is created.
   - **Default Update Notetype** - Set a default for the notetype used when a Service Request is updated.
   - **Default Escalate Notetype** - Set a default for the notetype used when a Service Request is escalated.
   - **Default Closed Notetype** - Set a default for the notetype used when a Service Request is closed.
   - **Default Resource Type** - From the Default Resource Type list, set the default resource type. This indicates the resource type associated with the Default Resource ID (see below).

- **Default Resource ID** - From the Default Resource ID list, set the person/group who will be the default resource for Service Request routing.
- **Reopen SR Time Limit** - Set the timeframe in hours during which a closed Service Request can be opened.

4. In the During Service Request Creation area, set the following defaults:

Enable Template:

- **Yes** allows the use of templates during Service Request creation.
- **No** prohibits the use of templates during Service Request creation.

There is also a profile option which controls this enabling of the templates. See the *Profile Options* appendix.

Search Knowledge Base:

- **Always Prompt Customer** gives users the option of searching or not searching the knowledge base.
- **Always Search Knowledge Base** enforces knowledge base search prior to submission of the service request.
- **Directly Submit to Oracle iSupport** bypasses the knowledge base search option. The knowledge base button does not appear in this case.

Enforce Product Selection:

- **Yes** enforces that the user select a product to associate with the request prior to submission.
- **No** bypasses the product selection enforcement option.

5. When finished, select Update.

7.6.3 Set up Service Request Templates

Service request templates provide a structured, formatted method of gathering information during Service Request creation. Templates characteristics include:

- Administrator-defined questions that gather information about service requests; these questions can be configured so that the user is required to answer them.
- Administrator-defined free-form and choice-type answers that relate to the questions posed on the template.

- Weighting of choice-type answers used to determine severity of service requests automatically.
- Ability to associate a template with a specific product and/or urgency.
- Short codes which assist in characterizing and routing the service requests.

Templates are presented to the customer/user during request creation as questions and responses.

The information gathered from the templates assists in:

- Routing the service request to the appropriate support agent or support group in Oracle Support.
- Determining the severity of the service request in Oracle Support.

This topic area includes:

- Creating New Templates
- Selecting Effective Dates for Templates
- Associating Products to Templates
- Associating Urgencies to Templates
- Defining Questions/Answers on Templates
- Defining Severity Thresholds for Templates
- Setting up a Default Template

7.6.3.1 Creating New Templates

Use the steps below to begin creating a new service request template.

Steps

1. Log in to the JTF login as Oracle *i*Support Administrator.
2. Navigate to Administration > Support > Request Management > Template. The Service Request Template Administration screen displays.
3. In an empty textbox in the Template Name column, enter a meaningful name for the new template.
4. In the Short Code column, enter a meaningful code for the template. The code must be less than 8 characters and should indicate an overall category for the template. For example, a short code for a template used for Toshiba laptop service requests could have a short code of TOSH_LAP.

Note: In the 11.5.6 release of Oracle *i*Support, the Short Code field is non-functional, but it is recommended that you use it so that when it is utilized in a future release, existing templates will already be using it. In a future release, the short code will help route service requests. The short code is not exposed to end users.

5. Select Add. The screen refreshes and displays a confirmation message.
6. Next, select effective dates for the template. Click on the hyperlink of the template name. The Modify Template screen appears.
7. In the Template Info area, select the calendar icon next to the Start Date field and choose an effective start date for the template. Do the same for End Date. (You can also use the End Date function to disable existing templates.) All of the date steps are optional.

   Renaming the template and altering the Short Code can be done here as well.
8. Select Update. A confirmation message appears.
9. Next, associate the template with a product. Select the underlined hyperlink of the appropriate template. The Modify Template screen displays.
10. In the Associate Attribute, Attribute to Associate: Product area, select Modify. The Associate Product screen appears.
11. From the Available Product list, select the desired association(s) and use the right (>) arrow button to move them to the Associated Product column. Select Update and then Back (bottom of screen) to return to the Associate Attribute area of the Modify Template screen.
12. Next, associate an urgency to the template. Select the underlined hyperlink of the appropriate template. The Modify Template screen displays.
13. In the Associate Attribute, Attribute to Associate: Urgency area, select Modify. The Associate Urgency screen appears.
14. From the Available Urgencies list, select the desired association(s) and use the right (>) arrow button to move them to the Associated Urgencies column. Select Update and then Back (bottom of screen) to return to the Associate Attribute area of the Modify Template screen.
15. Next, define questions and answers for the template. Select the underlined hyperlink of the appropriate template. The Modify Template screen displays.
16. **Set up Questions on Template:** In the Modify Template screen, the Template Detail area will list any questions associated with the template. If none is

associated, there will be an empty text box. Enter a question for the template in the empty Question field textbox.

17. Select Answer Type: You have two options for Answer types:

    - **Choice** - This is a pick-list type answer and can be used in scoring. Scoring is used for determining the Severity of the Service Request.
    - **Free Text** - This is a free-form answer; you can specify the number of lines allowed for the answer (see below). This answer cannot be used in scoring.

18. If your question requires a Choice-type answer, select whether you wish the answer to be used in scoring / weighting when determining severities for submissions which use this template (see Set Severity Thresholds below). Answers to the question will be weighted from 1 to 9 during the Answer setup (see Set up Answers for a Choice Question below).

19. To enforce that the user is required to answer the question, select Yes in the Response Required field. Mandatory questions force the user to provide an answer before the application will continue creating the request. To make the question optional for the end user, choose No.

20. Select Add. The screen refreshes, with the question appearing as an underlined link in the Template Detail area.

21. To sort the questions, select Sort and use the up and down arrows in the Sort Questions screen to arrange the questions in the desired order. Use the back button to return to the Modify Template page.

22. Optionally, to edit a question, click on the hyperlink of the question you wish to modify.

23. **Set up Answers for a Choice Question**: In the Template Detail area, click on the underlined hyperlink of a question. The Define Question and Answer screen appears.

24. Enter an answer for the question in an empty textbox.

    The answers you set up here become a pick-list for the end user, and the answer you select as a default will appear as the default answer on the user side.

25. For each Choice-type answer, set a value of 1-9. Once the end user answers the questions, the application will add up these values and the final score will be used to determine the severity of the Service Request, based on the Severity Thresholds you set (see below).

26. For Text-type questions, you will not need to determine answers. Instead, in the Define Question and Answer screen, select the number of rows the user will be limited to when answering.

27. Select Update to save changes, and Back to return to the previous screen.

28. Next, set up severity thresholds for the template. Select the underlined hyperlink of the appropriate template. The Modify Template screen displays.

    Use the Set Severity area to set Severity Thresholds for the template. The severities listed here come from the Severity setups in TeleService. For each Severity, enter a value in the Start and End Threshold boxes. Do not define overlapping thresholds or ranges (see examples, below). The weighting you gave to each scorable question in the defining answers step above will be calculated and used here. The user responses to all questions used in scoring are averaged, and the score determines the severity level.

    The sum score from all of the scorable answers is determined by the application and compared to the total possible. The percentage is determined by the application, and the appropriate threshold is assigned. See the example below for clarification.

Note: You do not need to define thresholds for all of your severities, only the ones you wish to use. Also: You can select one of the severities as a default and all templates will use that severity. Severities for which you do not define thresholds will be ignored by the application.

Sample scenario related to this setup

You have defined a new template with two questions on it. Each question has three possible answers, for a total of six answers defined by the administrator, and two possible answers for the user (user can only select one answer per question).

In this example, you have set up each of the question's three answers with identical scores: 1, 4, and 5. Since the user can only select one answer per question, the highest possible score in this scenario would be 10 (highest score for each question is 5, and 5 plus 5 is 10). (The user cannot see these scores.)

The user selects an answer from the first question with a score of 1. He selects an answer from the second question with a score of 4. Thus, the total of the two answers is 5. The application find the score of 5 and compares it against the total possible answer points, which in this case is 10. From there, the application formulates a percentage of answers scored (5) verses a total possible score (10). The percentage in this case is be 50%. Then, based on the severity thresholds you set (see

the example below), the application determines the severity (e.g, high, medium, low). Here are the thresholds set for this example:

High - Start Threshold = 61%; End Threshold = 100%

Medium - Start Threshold = 31%; End Threshold = 60%

Low - Start Threshold = 0%; End Threshold = 30%

29. When finished entering severity thresholds, select Update.When finished entering severity thresholds, select Update.

7.6.3.2 Setting up a Default Template

Oracle *i*Support uses the Default Template you set up when users select a product and urgency combination for which a template does not exist.

Only one default template is allowed.

Prerequisites

- A Service Request template has been created in Oracle *i*Support.
- The service request template feature has been enabled by selecting Yes in the Enable Template LOV on the service request defaults screen.

Steps

1. Set up a new template with general questions. The questions should be "catch all" type questions related to service requests. Use the following procedure to set the default template.
2. In the list of templates, in the Set as Default column, select the radio button next to the appropriate template.
3. Select Update.

7.7 Setting up Products

Service request functionality in Oracle *i*Support allows users to associate products associate with service requests, and allows administrators the option of enforcing product selection during request creation. Products also can be associated with service request templates set up by administrators. To enable product association, you must set up Oracle Inventory and Oracle Install Base.

See the *Integrating Oracle iSupport with Products and Returns* chapter of this guide for more information.

7.8 Using Knowledge Management in iSupport Service Request

The creation of new service requests can be reduced by allowing or enforcing users to search a knowledge base prior to submission. Oracle Knowledge Management must be set up to facilitate this functionality in Oracle *i*Support.

See the *Integrating Oracle iSupport with Oracle Knowledge Management* chapter of this guide for more information.

7.9 Setting up E-mail Submission of SR Details

Service request functionality in Oracle *i*Support allows users to have the details of a service request e-mailed to them by clicking a button on the service request verification screen.

The application that facilitates the e-mail submission is Oracle Workflow. See the *Integrating Oracle iSupport with Oracle Workflow* chapter of this guide for more information.

Note: A valid e-mail address must be set up for the user in his Profile in order for the e-mail feature to work.

8

Integrating Oracle iSupport with Products and Returns

This chapter details how to integrate Oracle *i*Support with the applications that provide products and returns functionality. Topics include:

8.1 Understanding Integration with Products and Returns

Several processes within Oracle *i*Support require the use of products and purchasing-related applications, including:

- Creating and processing returns
- Viewing invoice information
- Viewing payments data
- Viewing shipment information
- Creating and updating service requests
- Maintaining products databases, such as customer products and inventory items

The information in this chapter is designed to provide the merchant implementing Oracle *i*Support with setup details directly related to Oracle *i*Support.

The applications that integrate with Oracle *i*Support and provide products repository and returns functionality include:

- Oracle Inventory
- Oracle Bills of Materials
- Oracle Install Base
- Oracle Order Management
- Oracle Order Capture APIs
- Oracle Shipping
- Oracle Advanced Pricing
- Oracle Purchasing
- Oracle Service Contracts
- Oracle Customer Care

Remember, a full install and setup of each product or purchasing application must be performed in order for the functionality to perform as described. Consult the specific product documentation for full implementation details.

8.2 Setting up Oracle Inventory

Oracle Inventory supplies the infrastructure that holds an organization's entire product repository and configuration. It integrates closely with Install Base, which is the repository of customer- or party-purchased products.

Both Inventory and Install Base may be required for service request functioning, Products tab functionality, and Accounts tab functionality in Oracle *i*Support.

For information on how to set up Oracle Inventory, see *Oracle Inventory Implementation Guide.*

8.3 Setting up Bills of Materials

Oracle Bills of Materials (BOM) is an application that allows the configuring of groups of products into coordinated and complementary systems. Within BOM, you can define product relationships and create products with multiple components and subcomponents. BOM integrates with Inventory and Install Base.

BOM is an optional integration with products and returns functionality in Oracle *i*Support.

If using BOM, setup Oracle Bills of Materials. Refer to *Oracle Bills of Material User's Guide*.

8.4 Setting up Oracle Install Base

Oracle Install Base is a repository which maintains the customer products in tree structure. Install Base maintains all the customer details, installation details, product information, and applicable service agreements. Install Base uses the concurrent program, Install Base Interface, to populate tables when new data is added.

Oracle *i*Support uses Install Base for:

- Retrieving customer product data in the Accounts tab
- Adding items to the Install Base using the Products tab
- Retrieving customer products while creating service requests

Confirm the setup of Oracle Install Base. Refer to *Oracle Install Base Implementation Guide*.

Note: When setting up new users of the Install Base functionality, please add the role, CSI_END_USER to them. This role contains the required permissions for Install Base general users.

8.5 Enabling Returns Functionality

The following applications and relevant dependencies are necessary for returns functionality in Oracle *i*Support:

- Oracle Order Capture APIs
- Oracle Order Management

8.5.1 Understanding Returns in OM

In Release 11*i* of Oracle Order Management, RMA is often used synonymously with Return or Credit Orders and Returned Material. An order can have a mix of outbound (regular) and inbound (return) lines, if not restricted by the order type definition. Credit order types are of the order type category Return, while an order with Mixed order type category can contain both regular and return lines. Each order type and each line type is associated with a workflow process. The Line Type

Category associated with the Line Type determines if it is a return. Line types can be variations of Return, such as Return with Approval, Return for Credit Only, etc., and have a line type category of Return.

OM supports a variety of methods for returning products. An agent or administrator decides at the time of authorizing the return how to process the request. For example, an agent can accept the return and process a credit for the customer, updating all sales activity and credit balances. Or, the agent may accept the return for replacement and enter a replacement order instead of issuing a credit.

Examples of returns supported by OM:

RMA with Credit Only - Company issues a credit without the customer returning the product.

RMA with Repair - Customer returns damaged product. Company repairs and returns the product to customer.

RMA with Replacement - Customer returns a product. Company sends a replacement product rather than issuing a credit.

RMA with Receipt and No Credit - Customer returns a product sent to him on a trial basis or at no charge. Company does not issue a credit.

RMA with Receipt and Credit - Customer returns a product. Company issues a credit.

Returned Item Fails Inspection - Customer returns product. Company inspects product and rejects it. Company either destroys product or sends product back to customer.

Process Flow:

1. Create an RMA in Oracle *i*Support.
2. Book the RMA into OM through Oracle Order Capture API.
3. Receive the RMA using the Receipts form of Oracle Purchasing.
4. Check the on-hand quantity of the item in inventory to verify that the correct quantity was received.
5. Fulfill the RMA line.
6. Generate a credit memo in Oracle Invoicing.
7. View the credit memo in OM.
8. Check the Shipped and Fulfilled quantity on the RMA line.

8.5.2 Understanding Returns in iSupport

Oracle *i*Support allows users to create a return by providing a UI that calls Oracle Order Capture APIs to submit the return to Order Management (OM) and perform customer validation. Oracle *i*Support does not create the return to OM directly.

Navigation to the returns feature is Account tab > Return > Create Returns.

For this release of Oracle *i*Support (11.5.6), iSupport only supports RMA with Receipt and Credit.

Process Flow:

Following is the process flow for creating a return within Oracle *i*Support. For information on Oracle Workflow items associated with returns, refer to the chapter in this guide, *Integrating Oracle iSupport with Oracle Workflow.*

1. Within Oracle *i*Support, the user accesses the Create Return screen.
2. User enters orders associated with his account number(s). For this release of Oracle *i*Support, the user must have an exact order number to create a return. Only orders that have been ordered (booked) can be returned.
3. The user provides the following information:
   - Account Number - This must be the account number associated with the order.
   - Contact for the company returning the item, if appropriate.
   - Bill to address - User must enter a bill to address. This indicates where the credit will be sent if the credit memo cannot be applied to an invoice. User can select alternate address using the drop list.
   - Ship from address - User will be see a default ship from address; this indicates where the return is originating from. User can select alternate address using the drop list.
   - Return reason - A return reason must be specified for each line being returned.
4. User selects the lines to be returned. Only items that are "returnable" can be returned. Only returnable lines will display select checkbox.
5. The page will calculate the credit amount for the user; this will be the amount of the order line. The ordered amount is the net selling price per unit multiplied by the quantity ordered.

6. Having selected a valid order item and quantity, user clicks Create Return and iSupport will submit the return to OM through the Oracle Order Capture API. If the return submission is successful, the user will receive an RMA number. If OM/Oracle Quoting-Forms return any errors, iSupport will capture and display them on the next page. When the return is booked, the same order line cannot be returned twice.
7. After creation of the return from Oracle *i*Support, the return is handled by Oracle Order Capture API, Order Management, Oracle Purchasing, Workflow APIs, Oracle Inventory (or Oracle Install Base), Oracle Accounts Receivable, and Oracle Invoicing.

8.5.3 Setting up Oracle Quoting-Forms

Set up Oracle Quoting-Forms according to the latest *Oracle Quoting-Forms Implementation Guide*. This will enable access to the Order Capture APIs that are required for returns functionality in Oracle *i*Support.

8.5.3.1 Returns Profile Options

The following profile options must be set to allow returns functionality in Oracle *i*Support:

ASO: Default Order Type - Set to **Mixed**.

ASO: Default Order State - Set to **Booked**.

8.5.4 Setting up Oracle Order Management

Using the Oracle Order Management (OM) Suite, you can enter sales orders, calculate the price of items on order lines, fulfill the orders -- for example, by shipping the items -- and send information to an accounts receivable system so that invoices are created. The core OM products are:

- Oracle Order Management - required for returns in Oracle *i*Support
- Oracle Shipping Execution (SE) - required for returns in Oracle *i*Support
- Oracle Pricing

These products are included when OM is purchased. Additional products are available which are also integrated with OM, and these include:

- Oracle Advanced Pricing - required for returns in Oracle *i*Support
- Oracle Configurator

- Oracle Accounts Receivable - a dependency for general Oracle *i*Support setup
- Oracle Advanced Planning and Scheduling

Confirm the setup of Oracle Order Management. While the steps in this section can assist you in setting up Order Management, you will need to refer to *Oracle Order Management Suite Implementation Manual* for complete setup information.

8.5.4.1 Set up Transaction Type Line Types

Order Management transaction types classify orders and returns. Credit order types are of the order type category Return.

In order for the returns feature to work properly, the default order type in Order Management must be set to Mixed. This is controlled by the profile option, ASO: Default Order Type = Mixed.

The following steps can assist you in setting up Order Management Line Types. For complete setup information, refer to the *Oracle Order Management Suite Implementation Manual*.

Steps

1. Log in to Oracle Forms; select Order Management super user or administrator responsibility.
2. Navigate to Setup > Transaction Types > Define. The Transaction Types window displays.
3. Query for **Mixed** (you must enter the word exactly as shown here) in the Transaction Type field. (Use F11 and Ctrl +F11 to query.) The Transaction Types window populates with the information for the Mixed transaction type.
4. Place the cursor in the Order Category field and select an Order Category of Mixed.
5. Place the cursor in the Default Return Line field and select a Default Return Line Type of **Return (Receipt)**.
6. Place the cursor in the Default Order Line Type field and select a Default Order Line Type of **Standard (Line Invoicing)**.
7. Access the Line Workflow Assignments screen by selecting the **Assign Line Flow** button.
8. In the Access the Line Workflow Assignments screen, add a new record.
9. In the Set Line Type field, select **Standard (Line Invoicing)** from the LOV.

10. Select an appropriate Item Type to populate the Item Type field.
11. In the Set Process Name field, select **Line Flow Generic** from the LOV.
12. Select an appropriate Start Date.
13. Add a second record.
14. In the Set Line Type field, select **Return (Receipt)** from the LOV.
15. Select an appropriate Item Type to populate the Item Type field.
16. In the Set Process Name field, select **Line Flow Return for Credit with Receipt**.
17. Select an appropriate Start Date for the record.
18. Select Ok. Save the changes.

8.5.5 Guidelines

- When the lot controlled and serialized items are returned, the serial number entered by the user is not validated against an Inventory serial number or the original order serial number. However, the serial number is captured in the RMA lines and is viewable in Oracle Receivables.
- Currently, Install Base does not get updated automatically when a serialized item is returned.
- ATO/PTO configurations are configured items. For example, a configuration such as a computer system can consist of many items. Fulfillment of the entire configuration is required before crediting. The usage of fulfillment set can achieve the result of triggering crediting only after the entire configuration is fulfilled.
- OM allows the return of freight and other special charges.

8.5.6 Troubleshooting Returns in Oracle iSupport

To find out what is wrong in case the Create Return fails in Oracle iSupport, it is helpful to properly generate a debug file from Quoting-Forms/Order Management when a return is created. Use the following steps:

1. Inside the database, one of the v$parameter, utl_file_dir, needs to be set to the debug file directory. Specify the correct directory in the init.ora file to set this.
2. Ensure the settings on the following Order Management (OM) and Order Quoting-Forms (ASO) profiles options:

- OM: Debug Level
- OM: Debug Log Directory - This directory needs to be the same as the directory pointed to by utl_file_dir above.
- ASO: Enable ASO Debug - Set to Yes.

Additional information on this topic is available in the *Profile Options* chapter of this guide.

8.5.7 Set up Oracle Advanced Pricing

Order Management uses Oracle Advanced Pricing for determining prices of goods sold; therefore, it is a mandatory module for returns execution.

Confirm the setup of Oracle Advanced Pricing. Refer to *Oracle Advanced Pricing Implementation Guide* for setup details.

8.5.8 Set up Oracle Shipping

Oracle Shipping provides shipping execution for Order Management and is necessary for the returns integration. It is mandatory for returns in Oracle *i*Support.

Refer to *Implementing Oracle Shipping* for setup details.

8.5.9 Set up Oracle Purchasing

The Receipts form of Oracle Purchasing receives an RMA when it is booked. Therefore, it is a mandatory module for returns execution.

Confirm the setup of Oracle Purchasing. Refer to *Implementing Oracle Purchasing.*

9

Integrating Oracle iSupport with Oracle Knowledge Management

This chapter addresses Oracle *i*Support's integration with the Oracle Knowledge Management module.

9.1 Overview of Oracle Knowledge Management

Oracle Knowledge Management (KM) is a comprehensive information management system that allows you to manage internal and external information using Oracle intelligent knowledge capture, storage, and distribution tools. It is a problem and solution management system and database. The solutions are separated by different criteria so that each solution has a specific meaning that relates directly to the issues being searched.

KM allows easy solution capture and rapid access to new solutions. It is also designed to provide focused results and to reduce the cost of providing service while increasing customer satisfaction, thus helping companies compete in the marketplace.

For more information on KM, see the Understanding Knowledge Management and Using Oracle Knowledge Management chapters in the latest version of *Oracle iSupport Concepts and Procedures*.

9.2 KM User Roles and Responsibilities

KM supports both internal and external users. All users can search for published solutions in the KM repository.

Roles determine screen-level permissions. Responsibilities determine which menus the user will be able to view.

- External users are end users who have only view and search access to published solutions.
- Internal users include KM agents, KM workers, and KM system administrators.

The following table lists responsibilities, menus, and tabs associated with internal KM users.

Table 9–1 Responsibilities, Menus, and Tabs associated with Internal KM users

Responsibilities	Menus	Tabs
CS_KB_KNOWLEDGE_ WORKER	CS_KB_TOP_KW_MENU	SMS > Search, Solution MES
CS_KB_AGENT	CS_KB_TOP_AG_MENU	SMS > Search, Solution
CS_KB_SYSTEM_ADMIN	CS_KB_TOP_MENU	SMS > Search, Solution, Setup MES

9.3 KM Concurrent Programs

You must run two concurrent programs to populate the tables that supply data to KM. How often you run these programs depends upon the specific needs of your company. Run these programs often enough to regularly pick up additions to the knowledge base, but not so often as to cause resource issues. The two concurrent programs are:

9.3.0.1 Knowledge Base Sync Indexes

This program retrieves any new solutions entered into the knowledge base for synchronization with the InterMedia Index. Intermedia text does not generate indexes automatically. When a new entry is added to the database, you cannot see it until the index is rebuilt. The short name for this concurrent program is CS_KB_ SYNC_INDEX.

If you cannot retrieve new solutions, this program may not yet have run.

9.3.0.2 Knowledge Base Update Used Count

The solution usage count depends on the number of times a solution is used to solve a problem. Every time a solution is used, the usage count is increased by one. In the applications that integrate with KM, e.g, Oracle iSupport, the question, *Can this solution solve your problem*, appears in the UI flow. If the user selects yes,

Knowledge Base Update Used Count concurrent program runs and updates the usage count in KM.

The Used Count table is not refreshed automatically -- it requires Knowledge Base Update Used Count concurrent program to update the table. This concurrent program is used to determine the most frequently used solutions and part of the solution score, during the search process. Frequently Used Solutions list the top *n* number of solutions. This number is defined by the merchant. It is based on the number of times a solution has been used to solve an issue.

The solution score in the Search Results screen is determined by the Solution Used Count and the InterMedia Index text match score. The higher the used count and the text match score, the higher the solution is placed in the results list. These scores are shown as a combined score to indicate the strength of the match to the query entered. The maximum score is 100.

The short name of this concurrent program is CS_KB_UPDATE_USED_COUNT.

9.4 Setup Dependencies for KM

These are the set up prerequisites for using KM functionality:

1. Set up the Notes module in Oracle CRM Foundation.
2. Set up Relational Database Management System (RDBMS) for InterMedia Text.
3. Set up KM to access the solutions database.

> **Note:** If you want to use the MES or Technical Library module, you have to set it up. See the latest version of *Oracle Marketing Encyclopedia System Implementation Guide* for more information.

9.5 Setting up Notes

The Notes module enables the entire CRM suite to create, maintain, and share notes related to customers, opportunities, service requests, and other business tasks. The Notes module allows you to capture extensive textual, project relevant information within Oracle CRM applications. Notes comes seeded with predefined Note Types. Use the following procedure to create additional, customized Note Types.

Steps

1. Log on to Oracle Applications Forms as a system administrator. In the Responsibility Form, navigate to CRM Administrator > Notes Setup > Note Type Setup.
2. In the Application Object Library (AOL), in the Note Types Lookups Form, place the cursor in the multi-rec block, and click the New Record icon in the menu bar to open a new record.
3. Enter the Code that you want to use, its meaning, and description in the appropriate columns. Enter a Tag (Note) and a Start Date, if desired.
4. Navigate to File > Save and Proceed. Close the Form if you have no new note types to enter.

9.6 Setting up InterMedia Text

InterMedia Text (iMT) provides integrated management of free text stored in the database, on websites, or on file systems. It extends the Oracle SQL query language to provide content-based search and retrieval of information on formatted documents and free text. This allows you to access a number of advanced text search capabilities from any SQL tool or interface.

InterMedia Text (iMT) 8.1.7 has features that improve index performance and ease-of-use. iMT also has features that are targeted in two key areas:

- Structured documents
- Multi-lingual databases.

You must set up Intermedia Text to use KM Search functionality.

For more information about InterMedia Text, navigate to:

- http://www.oracle.com/intermedia/ (external and internal users)
- http://otn.oracle.com/products/intermedia/index.htm (internal users)

9.7 Creating an Oracle KM System User/Administrator

To use KM, you must set up a user as an KM administrator in the JTF User Management Framework. Navigate to CS_SYSTEM_ADMIN role and assign the user CS_KB_SYS_ADMIN responsibility.

9.8 Creating a Resource Group

A resource group, in KM, is a group of users who perform specific tasks in the solution workflow process. Examples include resource groups for editorial and technical review.

Steps

1. Set up a user for Oracle *i*Support. See Setting up Users section of the *Implementation Tasks* chapter.
2. Give the user Workflow User responsibility. See *Oracle Applications Concepts and Procedures* and *Oracle Workflow Guid*e.
3. Create a resource group and associate the user to the resource group. See the Resource Manager section of the *Oracle CRM Application Foundation Implementation Guide.*
4. Relate the resource group to the application, Oracle *i*Support. *Oracle CRM Application Foundation Implementation Guide.*
5. Relate additional users to the resource group as desired.

9.9 Setting Up Solution Authoring Profile

Authoring flows define the steps or tasks in the solution workflow process.

After creating a solution and submitting it to the workflow, a KM internal user in the assigned user group can approve or reject the solution. Members of the user group who subscribe to a product or category in the Solution Authoring Profile screen will receive a notification when a solution is ready for review. Members who do not subscribe will not receive a notification but can search for all in-progress solutions from the Work Pending screen by clicking Search Work in Progress.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

> **Note:** Your system administrator can give you the values that should replace `<host>` and `<apache port>` in this URL.

2. Enter your user name and password.
3. Click Profile > Solution Authoring Profile.
4. In the Categories sub-section, click Add. The Select Solution Categories screen appears.
5. Check the check-box corresponding to the solution category that you want to select. Click OK.
6. In the Products sub-section, click Add. Select a product from the list or search for the product.
7. Click Update. Solution Authoring Profile is updated.

9.10 Running Concurrent Programs

A concurrent program runs simultaneously with other programs and/or tasks.

Prerequisites

1. Knowledge Base Sync Indexes and Knowledge Base Update Used Count Summary Concurrent Programs must be available.
2. An assigned user with appropriate responsibility to run the above programs.

Steps

1. To allow a user with the system administrator responsibility to run Knowledge Base Sync Indexes and Knowledge Base Update Used Count Summary concurrent requests:
   a. Log on to Oracle Applications Forms. Responsibilities window appears.
   a. Select the System Administrator responsibility.
   b. Navigate to Security -> Responsibility -> Define. Click Open. Responsibilities window appears.
   c. Query the system administrator responsibility to get the request group name for it.
   d. Navigate to Security -> Responsibility -> Request. Request Groups window appears.
   e. Query the request group name obtained for the system administrator responsibility.

f. Under the Request section, add the concurrent request if it does not already exist.

g. Enter information in the following fields:
Type = Program
Name = <concurrent program name>

h. Click Save.

2. To synchronize the InterMedia index:

- concurrent program name = Knowledge Base Sync Indexes
- short name = CS_KB_SYNC_INDEX

3. To update the solution used count for frequently used solutions:

- concurrent program name = Knowledge Base Update Used Count Summary
- short name = CS_KB_UPDATE_USED_CNT

4. To run the concurrent programs:

a. Switch the responsibility to system administrator.

b. Navigate to Concurrent ->Request.

c. Click Submit New Request.

d. Select Single Request.

e. Choose a program name.

f. Enter the required parameters. (The concurrent programs can be scheduled to run periodically).

g. Click Submit.

5. To view the status of the request:

a. Navigate to Concurrent -> Requests. Click Open. Find Requests screen appears.

b. You can enter the Request Id, or any other criteria to search for a request, or select All My Requests.

c. Click Find. Requests screen appears.

d. Click Refresh Data to see the latest status

9.11 Overview of Setup Steps

To set up KM, perform the following tasks. For other process-oriented, task-based procedures see the Using KM chapter in the latest version of *Oracle iSupport Concepts and Procedures.*

9.12 Creating a New Solution Type

KM is seeded with the symptom / cause / action (SCA) solution type. Perform the following procedure to create a new solution type.

Prerequisites

KM administrators with edit permissions (CS_Type_Edit) can create a new solution type.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

2. Enter your user name and password.
3. Navigate to SMS > Setup > Create Type. The Create Type screen appears.
4. From the Type drop-down list, select Solution.
5. Enter a name for the solution type in the Name field.
6. In the Description field, briefly describe the solution type. The description of a solution type is only for administrators and cannot be viewed by a customer.
7. Click Create. The Solution Type screen reappears with a Related section. You can relate statement types or external links to the solution type.

9.13 Viewing a Solution Type

In KM, information is organized into solutions, segmented into solution types. KM is seeded with symptom / cause / action (SCA) solution type.

Use this procedure to view existing solution types.

Prerequisites

All internal users can view existing solution types.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

2. Enter your user name and password.
3. Navigate to SMS > Setup > Solution Types. The Solution Types screen displaying a list of existing solution types appears.
4. Click the numbered link to view details. You can also update the solution type and add / delete statement types or external links here.

9.14 Updating a Solution Type

Use this procedure to update an existing solution type.

Prerequisites

You must have edit permissions (CS_Type_Edit) to edit a solution type.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

2. Enter your user name and password.
3. Navigate to SMS > Setup > Solution Types. The Solution Types screen with a list of existing solution types appears.
4. Click a Solution Type Number link to view the corresponding Solution Type screen.
5. To update the name or description of the Solution Type, enter the new information in the appropriate fields.
6. Click Update.
7. To update the related statement types or external links, make the required selections.
8. Click Update to save the changes, Restore to return to original values or Delete to delete the solution type.

9.15 Deleting a Solution Type

Use this procedure to delete a solution type. Do not delete the default solution type, SCA.

Prerequisites

- KM administrators must have edit permissions (CS_Type_Edit) to delete a statement type. Note: you must delete any statement types associated with the solution type.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

2. Enter your user name and password.
3. Navigate to SMS > Setup> Solution Types. The Solution Type screen appears.
4. Click the solution type numbered link that you want to delete.
5. In the Solution Type screen, ensure that there are no related statement types / external links listed in the Related sub section.
6. To remove related statement types:
   a. Click Add / Delete button. The Associate Statement Types screen appears. Disassociate the statement type from that solution type.
   b. Click Save. The Solution Type screen reappears with no statement types or external links in the Related section.
7. Similarly delete the related statement types and external links: Click Delete to delete the solution type. This procedure cannot be undone.

9.16 Creating a Statement Type

A statement is a description about any aspect of a problem, its cause, or resolution. Statements can be segmented into statement types.

Prerequisite

KM administrators with edit permissions (CS_Type_Edit) can create a new statement type.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

2. Enter your user name and password.
3. Navigate to SMS > Setup > Create Type. The Create Type screen appears.
4. In the Type drop-down list, select Statement.
5. Enter a name for the statement type in the Name field.
6. Enter a description for the statement type in the Description field.
7. Click Create. The Statement Type screen reappears with a Related section. You can also relate this statement type to a solution type or external links. To relate this statement type to an external link (e.g, JTF Note Type), perform the following steps:

   4. In the Related section, select External Links from the drop-down box.
   5. Click Add. The External Object screen appears. Click Note Type.
   6. The Note Type screen appears. Search for the note type that you want to add to this statement type. Use % for a wildcard search.
   7. From the Search results select the JTF note type to add to the statement type. Click Update.

   Note: The name of the JTF note type must be exactly the same as the statement type.

9.16.1 Associating a Statement Type to a Solution Type

You can associate a statement type to a solution type in the Associate Statement Types screen.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

2. Enter your user name and password.
3. Navigate to SMS > Setup > Solution Types. The Solution Types screen appears.

4. Click the Solution Type Number link. The linked Solution Type screen appears.
5. Click Add / Delete button. The Associate Statement Types screen appears.
6. 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.
7. Click Save to save the changes or Cancel to restore the original values and return to the previous screen.

9.16.2 Disassociating a Statement Type from a Solution Type

You can disassociate a statement type from a solution type in the Associate Statement Types screen.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

2. Enter your user name and password.
3. Navigate to SMS > Setup > Solution Types. The Solution Types screen appears.
4. Click the Solution Type Number link. The linked Solution Type screen appears.
5. Click Add / Delete button. The Associate Statement Types screen appears.
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 it to the Available Statements Types box.
7. Click Save to save the changes or Cancel to restore the original values and return to the previous screen.

9.17 Viewing a Statement Type

Statement type is an identifying name associated with a particular part of the solution type. For example, symptom is a statement type within the symptom / cause / action solution type.

Prerequisites

Internal users with view permissions (CS_Statement_View) can view existing statement types.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

2. Enter your user name and password.
3. Navigate to SMS > Setup> Statement Types. The Statement Types screen appears.
4. Click the numbered link to navigate to the associated Statement Type screen.

9.18 Updating an Existing Statement Type

Prerequisites

KM administrators with edit permissions (CS_Type_Edit) can edit a statement type.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

2. Enter your user name and password.
3. Navigate to SMS > Setup> Statement Types. The Statement Types screen appears.
4. Click the numbered link to navigate to the associated Statement Type screen.
5. Update the name or description of the statement type.
6. Click Update.
7. In the Related section, you can add or update the solution types or external links.
8. Click Update.

9.19 Deleting a Statement Type

Use this procedure to delete a statement type. You cannot delete the default statement type.

Prerequisites

- KM administrators with edit permissions (CS_Type_Edit) can delete a statement type. Note: You must remove a solution type or external link in use by the statement type to be deleted.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

2. Enter your user name and password.
3. Navigate to SMS > Setup> Statement Types. The Statement Types screen appears.
4. Click on the numbered link of the statement type you want to delete.
5. In the Statement Type screen, ensure that there are no related solutions types or external links listed in the Related sub section.
6. To remove a solution type or external link being used by a statement type:
   a. In the Remove column, check the relevant checkboxes.
   b. Click Update.
7. After removing the related solution types or external links, click Delete. This procedure cannot be undone.

9.20 Adding Solution Categories

You can add solution categories from the Managing Solution Categories screen.

Prerequisites

Administrative permissions to add solution categories.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

2. Enter your user name and password.
3. Navigate to SMS >Setup> Categories. The Manage Solution Categories screen appears.

4. Select the root category or one of the child categories to which you would like to add categories by clicking the corresponding radio button.
5. Click the Add button. A new field populated as New Category appears.
6. Remove New Category from the field and enter a new category name in that field.
7. Click Save.

9.21 Editing Solution Categories

You can edit solution categories from the Managing Solution Categories screen.

Prerequisites

Administrative permissions to edit solution categories.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

2. Enter your user name and password.
3. Navigate to SMS >Setup> Categories. The Manage Solution Categories screen appears.
4. Select the root category or one of the child categories to edit by clicking the corresponding radio button.
5. Click Edit.
6. The selected category name appears in a field.
7. Edit the category name.
8. Click save.

9.22 Deleting Solution Categories

You can delete solution categories from the Manage Solution Categories screen.

Prerequisites

Administrative permissions to delete solution categories.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

2. Enter your user name and password.
3. Navigate to SMS >Setup> Categories. The Manage Solution Categories screen appears.
4. Select the category you want to delete by clicking the corresponding radio button.
5. Click Delete.

9.23 Creating a New Authoring Flow

Authoring flows define the steps or tasks that a solution must follow in the solution approval or rejection process.

Prerequisites

Administrative permissions to create a new authoring flow.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

2. Enter your user name and password.
3. Navigate to SMS > Setup >Authoring Flows. The Available Flows screen appears.
4. Click Create. The Authoring Flow Set Up screen appears.
5. Enter a flow name.
6. For each row, enter an order number, select the Step, Assigned to, and Action fields.
   - Order: A number determining view order.
   - Step: an authoring flow can be assigned any of the following steps: Deleted, Draft, Editorial Review, Public, Public Internal, Public Limited, Published, Technical Review, and Under Edit

- Assigned To: an authoring flow can be assigned to any of the user groups that have required permissions. Examples include, Business User Group, Editorial Reviewers, and Technical Reviewers.
- Action: an authoring flow can have Notify, Obsolete, or Publish actions.

7. Click Update.

9.24 Viewing Authoring Flows

Authoring flows are the steps or tasks that a solution goes through in the solution approval or rejection process.

Prerequisites

Administrative permissions to view (CS_Workflow_Setup_View) a new workflow.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

2. Enter your user name and password.
3. Navigate to SMS > Setup >Authoring Flows. The Available Flows screen appears.
4. Click the Authoring Flow name to view flow details.
5. On this screen you can modify the following authoring flow parameters:
   - Order: A number determining view order.
   - Step: an authoring flow can be assigned any of the following steps: Deleted, Draft, Editorial Review, Public, Public Internal, Public Limited, Published, Technical Review, and Under Edit
   - Assigned To: an authoring flow can be assigned to any of the user groups that have required permissions. Examples include, Business User Group, Editorial Reviewers, and Technical Reviewers.
   - Action: an authoring flow can have Notify, Obsolete, or Publish actions.
6. You can also add a new row of values by clicking the More Rows arrow or delete a row by checking the Remove checkbox corresponding to the row that you want to remove. Click Update.

9.25 Setting Up Frequently Used Definitions for Solutions

You can provide your customers with a list of frequently used solutions within a specified time period. Use this procedure to set up frequently used definitions for solutions.

Prerequisites

KM administrators with update permissions (CS_Freq_Used_Def_Update) can add or update frequently used definitions.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   `http://<host>:<apache port>/OA_HTML/jtflogin.jsp`

2. Enter your user name and password.
3. Navigate to SMS > Setup > Frequently Used Definition. The Frequently Used Definitions screen appears.
4. Select the time period that you want to use as a default time period.

   Note: You can also remove a time period from the list.

5. Click Update.
6. To add a new time period, click Add. The Add Definition screen appears.
7. Enter the new name, description, and number of days.
8. Click Save.

   Note: To view Frequently Used Solutions, navigate to Oracle iSupport Homepage. In the How can we help you section, click Frequently Used Solutions.

10

Integrating Oracle iSupport with Oracle Workflow

Oracle *i*Support integrates with Oracle Workflow to provide e-mail submission and other workflow processes.

Topics in this chapter include:

- Oracle Workflow Overview
- Overview of Oracle Workflow Functionality in iSupport
- Setting up Oracle Workflow

10.1 Oracle Workflow Overview

Oracle Applications 11i comes with Oracle Workflow (WF) already installed as part of the Applications Object Library (AOL). WF consists of two tiers:

- Workflow Client (Workflow Builder)
- Workflow Server

The sections below provide an overview of these two tiers.

10.1.1 Workflow Client

Workflow Client is the Workflow Builder which is used by Workflow developers to create or modify custom workflows. This is installed on Windows 95/NT/2000 clients only.

10.1.2 Workflow Server

The Workflow Server consists of the following elements:

Workflow Engine: Monitors workflow states and coordinates the routing of activities for a process. Changes in workflow state -- such as the completion of workflow activities -- are signalled to the engine via a PL/SQL API or Java API. Based on flexibly-defined workflow rules, the engine determines which activities are eligible to run, and then runs them. The Workflow Engine supports sophisticated workflow rules, including looping, branching, parallel flows, and subflows.

Workflow Notification Mailer (WFMAIL): Electronic mail (e-mail) users can receive notifications of outstanding work items and can respond to those notification using their e-mail application of choice.

> **Note:** Email notifications will only be sent if the Workflow mailer is setup and configured properly. The PHP/Self Service Workflow notifications page can also be used to view notifications. Please refer to the Workflow documentation for more information on how to start and configure the workflow mailer.

Workflow Definitions Loader (WFLOAD): The Workflow Definitions Loader is a utility program that moves workflow definitions between the database and corresponding flat file representations. You can use it to move workflow definitions from a development to a production database, or to apply upgrades to existing definitions. In addition to being a standalone server program, the Workflow Definitions Loader is also integrated into Oracle Workflow Builder, allowing you to open and save workflow definitions in both a database and a file.

Workflow Monitor: Workflow administrators and users can view the progress of a work item in a workflow process by connecting to the Workflow Monitor using a standard Web browser that supports Java. The Workflow Monitor displays an annotated view of the process diagram for a particular instance of a workflow process, so that users can get a graphical depiction of their work item status. The Workflow Monitor also displays a separate status summary for the work item, the process, and each activity in the process.

Message Delivery Scheduler Concurrent Program:

Workflow Background Engine/Workflow Background Process Concurrent Program: A supplemental Workflow Engine that processes deferred or timed-out activities.

Purge Obsolete Workflow Runtime Data Concurrent Program (WF_PURGE): This program purges obsolete item types runtime status information. source:

For more information on Oracle Workflow, see the *Oracle Workflow User's Guide*.

On MetaLink, search for Oracle Workflow to find additional relevant documents.

10.2 Overview of Oracle Workflow Functionality in iSupport

The sections that follow describe Oracle Workflow's relationship to Oracle *i*Support. For more information on Oracle Workflow, see the *Oracle Workflow User's Guide*.

10.2.1 Service Request

Oracle *i*Support features the ability to create, update, and track service requests. It does this through integration with Oracle Support (Oracle TeleService).

Service request types can be linked to an Oracle Workflow process that can be automatically launched when a service request is created, or manually launched in the service request screen in Oracle Support. Oracle Workflow automatically notifies service personnel about their assignments based on service request. When a service request is escalated, Oracle Workflow processes and delivers the notifications regarding escalation activity.

Oracle *i*Support also uses Oracle Workflow to submit service request details to users. This is done via the *Email this to me* button during service request creation.

For more information, see:

- *Oracle Workflow Guide*
- *Oracle Support Implementation Guide*
- *Oracle iSupport Implementation Guide:Integrating Oracle iSupport with Service Request*

10.2.2 Returns

When a customer books a return in Oracle *i*Support, Workflow picks it up using the seeded workflow, Order Flow - Return with Approval. Next, Workflow uses the Return for Credit with Receipt workflow to send the return to the Return Receiving Line stage. Then, the receiving agent from Oracle Purchasing uses Oracle Purchasing to pull up the Return Material Authorization (RMA) to verify and mark the items as received. The agent then selects a destination for the product(s), such as Oracle Inventory. As the receiving agent does this, a Workflow API is invoked to move the workflow to the next stage, and Order Management receives data that updates the RMA as appropriate. The workflow now waits in Oracle Inventory. It is

here that an agent verifies and indicates in Inventory that the correct quantity has been received. When a configurable item set (BOM-enabled) is returned, the workflow will wait here until all items are checked into the inventory. The workflow will next invoke the Accounts Receivable interface APIs. After all of the items are fulfilled, an invoice is generated and a credit memo can be generated through Oracle Invoice auto-invoice master program.

For more information, see the chapter, *Integrating Oracle iSupport with Products and Returns*.

10.2.3 Homepage Subscription E-mails

The Homepage e-mail subscription feature uses Oracle Workflow to process e-mails. This can be useful if a user is unable to access the Homepage for a period of time. The user signs up for the subscription e-mails through the Profile > Support menu. In the Support page, the user can select the days that the e-mails should be sent and whether the e-mails should be HTML or text-based. The system then uses Workflow to sends the e-mails to the address setup in the Profile > Contact Points menu.

For more information, see the Setting up iSupport Homepage topic in the *Implementation Tasks* chapter.

10.2.4 Knowledge Management

Oracle Workflow is essential for the solution authoring feature of knowledge management. Using Workflow, the authoring process allows users to define the steps in processing content. The process can be as simple as a single step, author-publish, or can include several approval stages prior to publication. In an approval-dependent process, Workflow allows content to be rejected back to the previous stage or a selected previous stage. Individuals involved in solution authoring can be assigned to specific groups that are aligned with specific stages and categories of content, and these groups can be sent e-mails notifying them of the status of content.

For more information, see the chapter, *Integrating Oracle iSupport with Oracle Knowledge Management*.

10.2.5 User Approvals

The approvals notifications used in the CRM User Management Framework are dependent upon Oracle Workflow. The workflow notifications provide e-mails to user approvers notifying them that they have users in the queue waiting to be

approved. Workflow also sends e-mails to users notifying them that they have been approved for an application. For more information, see the *Oracle CRM Technology Foundation Implementation Guide*, the *Oracle CRM Technology Foundation Concepts and Procedures, and the CRM User Management online help.*

10.3 Setting up Oracle Workflow

Refer to the *Oracle Workflow Guide.*

11

Diagnostics and Troubleshooting

This section contains instructions on how to troubleshoot specific problems that you may encounter in the configuration or administration of Oracle *i*Support. Topics include:

- Stop / Start (Bounce) Apache Server
- Java / HTML Stack Errors
- How to Find Responsibility ID Values
- Debugging iSupport Returns Functionality
- Customizing the iSupport Quick Find Menu
- Oracle iSupport Administration FAQs

11.1 Stop/Start Apache (Bounce) Server after Patching

After you apply a patch that affects Java applications, you should stop and re-start the Apache server and clear the cache on the Apache server. This will help to minimize patching errors.

Note: For 11.5.4 and above, the cache is being taken based on the Servlet Initialization parameter, page_repository_root. This parameter can be located in the zone.properties file section: servlet.oracle.jsp.JspServlet.initArgs=page_repository_root=$<ANY Directory> _pages.

11.2 Java/HTML Stack Errors

The following section addresses typical issues associated with the Java applications and the HTML technology stack. Topics in this section include:

11.2.0.1 Understanding JSPs and Server Cache

The HTML applications are made up of Java Server Pages (JSPs). JSPs are converted into Java programs (files with the extension, .java), and those Java programs are converted into Java binaries (files with the extension, .class). These Java binaries will be executed by the Jserv Java Virtual Machine (JVM). This translation process happens on the fly for every JSP, and once it is completed, the Java programs, along with the Java binary, are stored/cached in a special directory called `_pages`.

11.2.0.2 Where are E-Commerce Cookies Stored?

The cookie file for Netscape browsers is located under the Netscape\Users\YourNetscapeUser directory. The file is called cookie.txt.

Cookie files for Internet Explorer are located in the C:\WINDOWS\Cookies directory. The name of the file is yourWindowsUser@domain.com.

11.2.1 JspCompileException

Problem Description

While navigating the HTML application, you receive the following error:

```
JSP Error: Request URI:/OA_HTML/jtfasuf.jsp

Exception:oracle.jsp.provider.JspCompileException:

Errors compiling:e:\oracrm\viscomn\html\_pages\_oa__html\\_
jtfasuf.java:706

Incompatible type for method. Can't convert into
java.lang.Object.
params.put('companyid',ub.getCompanyPartyID());
```

When applying E-Commerce patches, the Java Business Objects are replaced in the apps.zip and the JSP files are replaced in the system. The server cache is not rebuilt automatically, unless a directive has been specified in the JSP. This leads to an inconsistency or mismatch (displayed as the error: Incompatible type for method. Cannot convert into java.lang.Object) between the JSP and the Java Business Object in use. Therefore, the oracle.jsp.provider.JspCompileException occurs.

The directive that makes the cache able to be rebuilt is developer_mode = true. This is a servlet initialization parameter for Oracle Java Server Page Servlet, and it can be found in the jserv.properties file located in $APACHE_TOP / Jserv / etc. path of any installation.

Solution Description

Most of the time, this error can be resolved by removing the server cache (JSP / Jserv), and stopping and re-starting the web server. When you remove the server cache, the Java programs and the Java binaries are rebuilt, and when bouncing the web server, the Java classes cached in memory are removed. This then eliminates any possible mismatch and the exception.

11.2.2 NoSuchMethod

Problem Description

You receive the error, `java.lang.NoSuchMethodError`.

This error occurs because the system is trying to use a method within a Java object that does not exist. This error results due to incorrect / improper setting of the classpath variable. In the case of Apache / Jserv, the classpath is defined in a special configuration file called jserv.properties, usually located at $APACHE_TOP / Jserv / etc. (for example, $APACHE_TOP / Jserv / conf in Windows NT).

Other, not-as-common causes for this error are:

- Incorrect patch set level or missing patches
- Errors while patching application
- Bug in the application

11.2.3 JTF Login Page Errors

Problem Description

You are trying to log into the HTML stack via the jtflogin.jsp or the jtfdefaultlogin.jsp.

Jtflogin.jsp page does not display and returns the message, `error in error page`.

Jtfdefaultlogin.jsp page does not display and returns a message like `system error`, followed by several Java messages, the most significant being `oracle.apps.jtf.base.session.ServletSessionManagerException`.

You have tried to run the diagnostics via jtfqalgn.htm or jtfmain.htm and the database connectivity tests fail.

Solution Description

There can be several reasons for this problem scenario, including configuration files not being correct for httpd.conf, jserv.conf, jserv.properties, and zone.properties.

The following solution is for correcting one specific condition where your .dbc file has been manually edited, looks correct, but the connectivity issue persists.

1. Select * from fnd_application_servers:

   The query should return one row. If the query return more than one row, delete the rows that are most obviously incorrect. You will probably be able to recognize the invalid rows by the IP address column (server_address) that points to an invalid host database tier.

   The authentication string in this table (column server_id) must match the same string in your host_sid.dbc file (appl_server_id).

2. Make a backup copy of your .dbc file.

3. To ensure that everything is in sync, run the adgendbc.sh script located in your $COMMON_TOP\admin\install directory. This script takes no parameters except -deinstall, which you probably do not want to do. This script will assign a new authentication string (server_id), update your .dbc file, and update your fnd_application_servers table.

   It's okay if you get an error message related to unique key constraint (read the script file).

4. Double-check the information in your .dbc file and fnd_application_servers table. It should be in sync. Display or print the .dbc file. Please do not use an editor, because you may forget the rule and save it.

Summary

It is strongly recommended that you do not edit your .dbc file. Results are unpredictable and can take a long time to diagnose.

11.2.4 java.lang.nullpointerException

Problem Description

You receive the error, `java.lang.nullpointerException`.

This error occurs because the system is trying to use an object (variable) that has not been instantiated (initialized). The instantiation problem can be due to:

- Bug in the application
- Invalid business scenario or flow caused by a configuration problem

Note: If you receive this error while running Rapid Install: On the screens that tell RapidWiz where to store files/directories, do not press Ctrl + V (paste) with an empty clipboard. Be sure your clipboard has some data stored on it before pressing Ctrl + V, or you will receive an error, Java.lang.NullPointerException. (The command in Windows for copying text to the clipboard is Ctrl + C.)

Summary

If you are unable to resolve this error, create a Technical Assistance Request (TAR) with Oracle Support, and be sure to attach the log files for the application.

11.2.5 JTF-0198

Problem Description

You receive the error, `JTF-0198`.

This application-generated error occurs when the system cannot identify a valid cookie. Most of the time, the root cause of the problem is one of these two:

1. The domain name field in the ICX_PARAMETERS table is set incorrectly.
2. You have more than one system installed (with the same domain configuration) and with the same cookie name, and are accessing both systems from the same browser/machine. Intermittently, the server rejects the cookie because it finds two identical cookies on the two systems that are being run.

Solution Description

To resolve this error, use the following steps.

1. For the first case, set the domain name to either null or a fully qualified domain name. For example, if your domain name is computers.com, then the fully qualified domain name is `.computers.com`. This field can accept no abbreviated versions of the domain name. **Note that the fully qualified domain name must contain a dot (.) starting the domain**.

   For domains that do not belong to the global internet (i.e., private intranets) the session_cookie_domain field in ICX_PARAMETERS table must be set to the correct domain. If the domain does not belong to the global internet, the preferred value for the session_cookie_domain field in ICX_PARAMETERS table is `null`.
2. Change the value of the JTF Property cookie name in one of the systems. Stop all browser sessions and clean browser cookie files.

   The cookie file for Netscape browsers is located under the Netscape\Users\YourNetscapeUser directory. The file is called cookie.txt.

   Cookie files for Internet Explorer are located in the C:\WINDOWS\Cookies directory. The name of the file is yourWindowsUser@domain.com. In the case of IE, you should delete the file name with the extension that matches the domain name of the server you are trying to reach, or delete them all.

Summary

If you are unable to resolve this error by following the above steps, create a Technical Assistance Request (TAR) with Oracle Support, and be sure to attach the log files for the application.

11.3 How to Find Responsibility ID Values

The following steps describe how to find the RESPONSIBILITY_ID value of a responsibility.

1. Log in to Oracle Forms application as sysadmin. Select System Administrator responsibility. Navigate to Security > Responsibility > Define. The Responsibilities form opens.
2. Enter query mode (F11). Under responsibility name, type in `IBU_%`. Execute the query (Ctrl + F11).
3. An Oracle *i*Support (IBU) user responsibility and its associated details will appear. Use the Down Arrow key to scroll through the list of Oracle *i*Support responsibilities.
4. To find the responsibility ID, place your cursor in the Responsibility Key field of the responsibility whose ID you wish to find. From the menu, select Help > Diagnostics > Examine. The Examine Fields and Variable Values window appears.
5. In the Examine Fields and Variable Values window, click on the LOV button of the Responsibility Key. In the LOV that appears, select Responsibility ID. The Examine Fields and Variables Values window will then be populated with the Responsibility ID for that responsibility.

11.4 Debugging iSupport Returns Functionality

To find out what is wrong in case the Return functionality fails in Oracle *i*Support, it is helpful to properly generate a debug file from Quoting-Forms/Order Management when a return is created. Use the following steps:

1. Inside the database, one of the v$parameter, utl_file_dir, needs to be set to the debug file directory. Specifying the correct directory in the init.ora file can set this.
2. Ensure the settings on the following Order Management and Order Quoting-Forms (Order Capture) profiles options:
   - OM: DEBUG LEVEL needs to be set. 10 is the highest debug level.
   - OM: DEBUG LOG Directory - This directory needs to be the same as the directory pointed to by utl_file_dir above.
   - ASO: ENABLE ASO DEBUG - Set to Yes.
   - See the chapter, *Integrating Oracle iSupport with Products and Returns* for additional information.

11.5 Customizing iSupport Quick Find Menu

The Quick Find Menu appears on most of the Oracle *i*Support UI pages. The steps below can assist you in customizing this menu.

1. Log in to the JTF UI as sysadmin.
2. Navigate to Settings > System > Advanced > View.
3. Select Oracle *i*Support's product code, IBU.
4. You will see a corresponding category and descriptor defined for the each search item.
5. Remove any items which you do not wish to use.

Note: When deleting items, be sure to remove the pairs of items that end in .categories and .desc.

11.6 Oracle iSupport Administration FAQs

The following are common questions that might be asked by an administrator or primary user on Oracle *i*Support.

- How do I customize iSupport?
- How do I remove links in the How Can We Help You? bin on the Homepage?
- Does iSupport support different languages?
- Can users renew contracts through iSupport?
- What is the relationship between iSupport and TCA?
- What is the significance of the account number in iSupport?
- Where do users reset their passwords?
- Why type of users can change their first and last names in the Personal Profile?
- What type of users can see company profile information?
- What causes permission errors under the Profile menu?
- Why would a user not be able to see the side menus in the Profile screens?
- What if I am a primary user who can see other companies' information?
- How can a user's address information be changed?

- What if I have removed a permission and now I want to restore the original values?
- How can a user add more than three attachments to a service request?
- How does selecting a default responsibility for users on the iSupport UI work?

11.6.0.1 How do I customize iSupport?

Oracle JDeveloper can be used for Oracle *i*Support custom development. It can be used to write, debug, deploy and test Java and JSP applications.

Note: However, not every aspect of Oracle *i*Support is customizable. Much of the Homepage code is generated in the PL/SQL layer, and to customize it you have to modify the PL/SQL packages.

11.6.0.2 How do I remove links in the How Can We Help You? bin on the Homepage?

Currently, the only way to eliminate a link from the help bin is to comment out the HTML section that generates the link in the procedure. Unfortunately, in the current code, you cannot afterward place the link back in.

The bin is generated from the IBU_HELP_BIN package, get_html procedure.

11.6.0.3 Does iSupport support different languages?

Yes. Oracle *i*Support is NLS and MLS compliant.

Note: Some hard-coded HTML, messages, and/or displays may appear in English.

- National Language Support (NLS) - Running of applications in one non-American English language.
- Multi Language Support (MLS) - Running of applications in more than one language, one of which is the base language.

See Oracle MetaLink for the latest NLS and MLS release notes.

11.6.0.4 Can users renew a contract through iSupport?

No, the current functionality in Oracle *i*Support allows you to view contract information. Contract renewal can be done through Order Management or Contracts Core applications.

11.6.0.5 What is the relationship between iSupport and TCA?

Trading Community Architecture is the name used in external marketing by Oracle to describe what is internally known as the TCA data model and architecture. TCA is an architecture concept designed to support complex trading communities. The goal of TCA is to provide the foundation for Oracle ERP, CRM, and eBusiness applications (i.e., the entire E-Business Suite). To do this, TCA strives to model all relationships within a *trading community*. This enables one data model to store B2B, B2B2C, B2C, and B2C2C data.

For example, the trading community of an appliance manufacturer may include suppliers, distributors, resellers, retailers, service providers, individual consumers, and business consumers. The appliance manufacturer not only wishes to track relationships between itself and other entities within the trading community, the manufacturer may also be interested in relationships that other community members have with each other. The manufacturer may not even have direct relationships with all the members of its trading community. But, it is important that the appliance manufacturer know about these entities and how they relate to other entities within the community.

In summary, there is only one customer data model / schema used both by ERP and CRM. The 11i Customer Model is not a product that can be purchased. Rather, it is the underlying data model that stores customer information and is included with any CRM or ERP application. All CRM modules utilize the Customer Model to store customer information, although the degree to which the Customer Model is utilized differs from module to module.

11.6.0.6 What is the significance of the account number in iSupport?

The account number represents a customer's financial record / account. In Oracle *i*Support, an account number is required to create a service request. Also, all real-time accounts inquiries in Oracle *i*Support are based on the account number.

B2C (individual) customers are assigned account numbers automatically by the system when they register. Customers can view their account numbers by navigating to the Profile screens (Profile > Accounts).

B2B (business) users can be assigned multiple accounts during or after registration approval. Account assignments are made on the JTF sysadmin console by a B2B user's primary user or merchant administrator. B2B users can view their account numbers and set a default account number in the Profile screens (Profile > Accounts).

11.6.0.7 How do users reset their passwords?

Access the user's profile information (Profile > Personal Profile) and enter a new password. Select Update on the page to save changes.

11.6.0.8 What type of users can change their first and last names in the Personal Profile?

B2B and B2C users can change their first and last names, but employee users cannot.

11.6.0.9 What type of users can see company profile information?

B2C users and employee users cannot see company profile information in the profile screens. The company information is applicable only to B2B users, and is contained in the TCA.

11.6.0.10 What causes permission errors under the Profile menu?

Users need IBU_PROFILE_VIEW or IBU_PROFILE_UPDATE permissions to view and update their profile pages.

11.6.0.11 Why would a user not be able to see the side menus in the profile screens?

Users need the seed data for JTF_USER_PROFILE_TYPE to access these menus.

11.6.0.12 What if I am a primary user who can see other companies' information?

If this occurs, check the roles (collections of permissions) assigned to you. Most likely, you have been assigned a role that contains one of the following permissions:

- IBU_USER_MGMT_VIEW_ALL_COMPANY
- IBU_USER_MGMT_VIEW_ALL_ROLE

These two permissions should only be given to an administrator who has the privilege to view information across companies.

11.6.0.13 How can a user's address information be changed?

The application administrator or primary user can change the addresses and contact points (phone, fax, e-mail data) of a user by searching for the user in the administration screens, selecting the underlined hyperlink of the username, and selecting the Profile button. From there, the administrator or primary user can

navigate to appropriate user information from the hyperlink menu to the left of the Profile screens.

Users themselves can select the Profile button to access and change their address and contact points information.

11.6.0.14 What if I have removed a permission from a role and now I want to restore the original values of the role?

Re-run the driver that creates the permissions.

11.6.0.15 How can a user add more than three attachments to a service request?

On the service request creation screen in Oracle *i*Support, there are enough rows/blank entry areas to add only three attachments. If a user wishes to add more than three attachments to the service request, this can be done by going ahead and creating the service request, and then accessing the details of the service request. In the Service Request Details screen, the user can add more attachments to the service request. Another way would be to zip (or compress or tar) the attachments into one file before attaching them to the service request.

11.6.0.16 How does selecting a default responsibility for users on the iSupport UI work?

A user can select a default responsibility from the Profile > Preferences menu. The next time the user logs in, the default responsibility chosen previously will be the default responsibility he logs in with. When the user selects the default responsibility, this overrides any default responsibility that the administrator has selected for the user. Conversely, if the administrator selects a default responsibility for the user from the Administration > Profile > Preferences menu, then when the user logs into the JTF login, the user will be logged in with the default responsibility chosen by the administrator. If a user logs in without a default responsibility having been set, then the user will be asked to choose from a list of responsibilities. This, however, can cause errors if the default responsibility the user selects in the prompt screen is for a Forms-based product. To avoid problems ensure that all users always have at least one responsibility defined.

A

Profile Options

This chapter describes the profile option settings needed to implement Oracle *i*Support. Topics include:

A.1 Before you Begin

Before making Oracle Forms application settings, ensure that Oracle Forms application is up and running. All of the steps in this section require you to log onto Oracle Forms application with the sysadmin login.

A.2 About User Profile Options

A user profile is a set of changeable options that affect the way Oracle applications appear and how they function. Oracle Applications uses a set of user profile options

that are common to all the applications. In addition, each module has its own unique set of user profile options.

For a complete list of profile options in the Oracle Application Object Library (AOL), see *Oracle Applications System Administrator's Guide*.

The system administrator sets user profile options at four levels that have a set hierarchy. From lowest level to highest, the profiles categories are:

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

Each user profile ordinarily exists at each level. For example, Oracle Applications provides a site-level Printer option, an application-level Printer option, a responsibility-level option, and so on. Oracle Applications enforced the level hierarchy to ensure that a higher-level option value overrides a lower-level value, with Site being the lowest and User the highest in the hierarchy. If, for example, you set your site-level Printer option to print to Printer 1, but your user-level Printer option is set to Printer 2, printing will occur at Printer 2.

Site-level option values are generally set by the system administrator before profile options are specified at the other three levels. The options specified at site-level work as defaults until the same options are specified at the other levels.

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

A.3 How to Set Profile Options

Use the following procedure to set any profile option.

Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Profile > System. The Find System Profile Values window opens.
3. Check the level(s) at which you wish to set the profile option.

- **Site**
- **Application** - If you choose this level, from the Application LOV, select the application for which you wish to set the profile option.
- **Responsibility** - If you choose this level, from the Responsibility LOV, select the responsibility for which you wish to set the profile option.
- **User** - If you choose this level, from the User LOV, select the user for whom you wish to set the profile option.

4. In the Profile field, enter the a partial profile name followed by the percent sign as a wildcard. **Example:** `IBU%`.
5. Select Find. The System Profile Values form opens with the results of your search.
6. Verify or set the profile option(s) at the levels that you selected.
7. Remember to save your work.

A.4 Setting CRM User Management Profile Options

The following is a list of profile options that affect the behavior of the CRM (JTF) User Management module. Set these profile options at the site level according to your requirements.

For additional information on CRM User Management, please see the *Oracle CRM Technology Foundation Concepts and Procedure*s, (user management chapters) and *CRM Technology Foundation Implementation Guide* (setting up users section).

- **JTF_UM_APPROVAL_URL** - Defines the absolute patch of the login page (jtflogin.jsp) that an approver must go to in order to accept or reject a request. The URL is included in the workflow notification sent to each approver. The same URL is sent to the user once their request is accepted or rejected.
- **JTF_UM_MERCHANT_NAME** - Defines the name of your organization. The workflow inserts this name into the request approvals and rejections when they are sent to the user.
- **JTF_UM_APPROVAL_OWNER** - Set by default to sysadmin, this profile option is used in the approval process. If the last approver in a predefined approval definition fails to approve a request, the person defined in this profile option will be the escalation point of contact and will receive the request. The user specified as the value for this profile option must have the CRM_HTML_

ADMINISTRATION responsibility and the JTF_REG_APPROVAL and JTF_SECURITY_ASSIGN_ROLE permissions.

- **JTF_UM_APPROVAL_TIMEOUT_MINS** - Defines (in minutes) how long a workflow notification remains in a queue before it is timed out. The default is 1440 (1 day). If you enter 0 as the value, no time out occurs. If no value is set, the profile option is defaulted to 0.

  Note: The Process Timeout field in the parameters window when starting the JTF Approval workflow must be set to Yes for this profile option to take effect.

- **JTF_REGISTRATION_CACHE** - Determines whether the browser will cache the data entered by a user during the registration flow. The default value is Yes. If set to Yes and if the user presses the Back button, then the data entered on the previous page is available. If the profile option is set to No, then the data (page) expires as soon as the user leaves the page.

- **JTF_PRIMARY_USER** - Predetermines the username that corresponds with the Universal Primary User Approver.

- **JTF_INDIVIDUALUSER_ACCOUNT** - When set to Yes, this profile option creates a new account (in the HZ_CUST_ACCOUNTS table) for each individual user. It also associates the user with the corresponding account. Users must have an account in order to purchase products through Oracle iStore.

A.5 CRM Technology Foundation (JTT) Profile Options

Several Oracle CRM Technology Foundation (JTT) profile options must be set for the Oracle *i*Support UI to display. The values of the JTT profiles set the basic JTT Foundation default elements and values. These profiles are seeded in the Profiles form in ERP, and values are defined by the user (as System Administrator).

These affect all users logged in with any responsibility that is associated with the application.

Steps

1. Log on to Oracle Forms as sysadmin / sysadmin.
2. Select the System Administrator responsibility.
3. Navigate to Profile > System > Find System Profile Values form.
4. Query the system for JTF profile options:
   a. Check the Application checkbox. Uncheck the Site checkbox, if necessary.

b. Enter iSupport in the Application field.

c. In the Profile field, enter JTF_PROFILE%, and select Find.

5. Verify and / or set the following JTF profile option for Oracle *i*Support. Use the topic below, **Finding Responsibility ID and Application ID Values**, for assistance.

- **JTF_PROFILE_DEFAULT_RESPONSIBILITY** - This value tells the system which responsibility to grant to users who are automatically approved by the system. This default responsibility ID will be different in every instance. Use the following steps to find this value.

Finding Responsibility ID and Application ID Values

Use the following steps to find the APPLICATION_ID and RESPONSIBILITY_ ID value of a responsibility.

a. Log in to Oracle Forms application as sysadmin. Select System Administrator responsibility. Navigate to Security > Responsibility > Define. The Responsibilities form opens.

b. From the top menu, select View > Find. Search for the responsibility that you wish to be the default responsibility, highlight it, and click Ok in the search window. The Responsibilities form is populated with the record for the selected responsibility.

c. With the cursor in any field of the record, select Help > Diagnostics > Examine. The Examine Field and Variable Values form opens.

d. In the Examine Field and Variable Values form, select APPLICATION_ID from the Field LOV. The Value field displays the value of APPLICATION_ ID.

e. In the Examine Field and Variable Values form, select RESPONSIBILITY_ID from the Field LOV. The Value field displays the value of RESPONSIBILITY_ID.

6. Verify and / or set these additional JTF profile options for Oracle *i*Support:

- **JTF_PROFILE_DEFAULT_APPLICATION** - 672.

This sets the default application. This must be set to the Oracle *i*Support application ID, 672.

- **JTF_PROFILE_DEFAULT_BLANK_ROWS** - 3

This sets the default number of blank rows in tables on the Oracle *i*Support UI. It can be set to any integer greater than zero. The recommended value is 3.

- **JTF_PROFILE_DEFAULT_CSS** - jtfucss.css

This designates the default cascading style sheet to use for HTML display. The recommended value is jtfucss.css.

- **JTF_PROFILE_DEFAULT_CURRENCY** - USD

This tells the application which country's monetary currency to use as a default. Set it to USD for U.S. Dollars if this is what you wish the default currency to be.

- **JTF_PROFILE_DEFAULT_NUM_ROWS** - 10

This tells the application how many rows to display when displaying tables on the UI. The recommended value is 10.

A.6 iSupport Service Request Profile Options

For the service request functionality to work in Oracle *i*Support, you must set the following profile options in Oracle Forms. These profile values are specific to Oracle *i*Support. For Oracle Support-TeleService profile options, please see the *Oracle Support Implementation Guide.*

- **Oracle iSupport: Default Closed Status**: This is the closed status of a service request when the user clicks the Close button. However, when status transition is used, sysadmin needs to make sure this status is a valid next status, otherwise the applications will error out. This value is mandatory, and can be set at application and site levels.
- **Oracle iSupport: Default Solved Status** - This value determines the status of the service request when it is solved after knowledge base search in Oracle *i*Support. This value is mandatory, and can be set at application and site levels.
- **Oracle iSupport: Default Updated Service Request Status:** Determines the default state of a service request when it is updated.
- **Oracle iSupport: Service Request Creation Note Type**: Determines the default Note Type when a Service Request is created. Not mandatory. Can be set at all levels.
- **Oracle iSupport: Service Request Update Note Type**: Determines the default Note Type used when a Service Request is updated. Not mandatory. Can be set at all levels.
- **Oracle iSupport: Service Request Escalate Note Type**: Determines the default Note Type when a Service Request is escalated.

- **Oracle iSupport: Service Request Closed Note Type**: Determines the default Note Type when a Service Request is closed.
- **Oracle iSupport: Search Knowledge Base Option**: Determines whether a Knowledge Base Prompt shows up on the Service Request creation page or not, and whether or not the Knowledge Base search procedure is required. Not mandatory. Can be set at all levels.
- **Oracle iSupport: Enforce Product Selection Option**: This value determines whether a product is mandatory while creating a service request. Not mandatory. Can be set at all levels.
- **Oracle iSupport: Service Request Reopen Time Limit in Hours:** Set to the time limit in hours within which one can reopen a service request.
- **Oracle iSupport: Enable Service Request Template** - Determines whether service request template is able to be used.

A.6.0.1 Obsolete iSupport SR Profile Options

- **Oracle iSupport: Service Request Product Category Set**: This determines the default category set used when creating a service request.

A.6.0.2 Currently Unused iSupport SR Profile Options

- **Oracle iSupport: Enforce Entitlement Check Option**: Determines whether an entitlement check will be enforced when creating a service request. Not mandatory. Can be set at all levels.

A.7 Service Core Profile Options

The following service core profile options can be set according to your business requirements.

- **Service: Use State Transition:** Determines whether state transitions can be used. Set to Yes at the application level to use state transitions. For more information on state transitions, see the chapter, *Integrating Oracle iSupport with Service Request*.
- **Service: Default Service Request Severity:** Determines the default severity of a created service request.
- **Service: Default Service Request Status:** Determines the default status of a created service request.

- **Service: Default Service Request Type:** Determines the default type of a created service request.
- **Service: Default Service Request Urgency:** Determines the default urgency of a created service request.
- **Service: Default Service Request Owner:** Determines the default Resource ID when a Service Request is created. This should be set at the application level.
- **Service: Default Service Request Owner Type:** Determines the default owner type of a created service request.
- **Service: Default Product Category Set:** Determines the default product category set for a service request.
- **Service: Default Platform Category Set:** Determines the default platform category set for a service request.
- **Service: Inventory Validate Organization:** Maps Inventory / Product Organization.source:
- **Service Item Flexfield (Product):** This value determines the Oracle Inventory key flexfield structure you want to use when displaying the product. This value is mandatory; without it, the system will be unable to display the product number. It is recommended that you set this profile to MSTK. Set at application and site levels.
- **Service: Item Flexfield (Service):** This value determines the Oracle Inventory key flexfield structure you want to use when displaying support services. This value is mandatory. It is recommended that you set this profile to MSTK. Set at application and site levels.
- **Service: System generated Service Request Number**
- **Service: Active Knowledge Base System** - Selection for which integrated HTML based Knowledge Base System is being used. Allowed values: Oracle Basic Knowledge Base Search, Oracle Advanced Knowledge Base Search.
- **Service: Auto Launch Workflow** - Determines whether Workflow launches automatically when a service request is created.
- **Service: Allow Updates Across Organizations** - Allows users to make updates and deletions to data not belonging to their own operating units. Set to Yes.
- **Service: Default Make Public Flag**
- **Service: Publish Flag Update Allowed**
- **Service: Time Unit of Measure Class**

- **Service: Minute Unit of Measure**
- **Service: Hour Unit of Measure**
- **Service: Day Unit of Measure** - Identifies the unit of measure representing the day. This option is required.
- **Service: Month Unit of Measure**
- **Service: Item for facilitating conversions of units of time**

A.8 Returns Profile Options

The following profile options allow returns functionality in Oracle *i*Support:

- **ASO: Default Order Type** - This profile determines how the order is to be processed in Oracle Order Management. The order types are set up in Oracle Order Management. This profile also determines what price list and currency code appear by default in the main Quoting form. If this profile value is null, no default value is assumed. Set to Mixed.
- **ASO: Default Order State** - Set to Booked.
- **ASO: Enable ASO Debug** - Set to Yes to allow returns debugging.
- **ASO: Product Organization** - Defines which product organization to look for products. *Note the space between the name ASO and the colon (:) in the name of the profile.* Set this to your master organization.
- **ASO: Validate Salesrep** - This profile is used to determine whether a Sales representative must be specified on a quote prior to creating an order. If this profile is set to Yes, a sales representative must be specified on the quote prior to creating an order. If this profile is set to No, then a sales representative will be defaulted from ASO: Default Salesrep. If this profile value is null, a default value of Yes is assumed. For Oracle *i*Support, set this value to No.
- **OM: Debug Level** - This profile option determines the level of debug messages printed in a OE Debug log file. To print all messages set it to 5 and for no messages set it to NULL. The default value is NULL.
- **OM: DEBUG LOG Directory** - The directory path of the OM debug log file. Specify the value from the session parameter `utl_file_dir` from `v$parameters`. The default value is NULL.

A.9 Knowledge Management Profile Options

Knowledge Management has its own set of profile options. If you are implementing Knowledge Management, set the following profile options:

- **CS_KB_ALLOW_KB_NOTE_UPDATE** - Allows the update of notes that have been saved to the Knowledge Base. Seeded value: No. Allowed values: No, Yes
- **CS_KB_DEFAULT_SOLUTION_TYPE** - Allows you to define a specific Solution Type as a default. Allowed values: any. Seeded default values:
  - KB_SYMPTOM
  - KB_FACT
  - KB_CHANGES
  - KB_CAUSE
  - KB_OBJECTIVE
  - KB_ACTION
- **CS_KB_DEF_CONTRIBUTION_STATUS** - Default Status for Knowledge Base Contributions: You can use the status with user privileges to determine which users can see what information. Seeded default value: Draft. Allowed values:
  - DRAFT
  - PUBLIC
  - PUBLIC_INTERNAL
  - TECHNICAL_REVIEW
  - UNDER_EDIT
  - PUBLIC_LIMITED
- **CS_KB_MAX_SEARCH_RESULTS** - Maximum Number of Search Results to be Queried from the Database: You can set up this value to any reasonable number. The top scored results in the database will be displayed from the highest score to the lowest score. Seeded default value: 100
- **CS_KB_PRODUCT_CATEGORY_SET** - Service: Default Knowledge Base Category Set. This selects the Product Category Set to populate the Product LOV in the Knowledge Management screens.

A.10 Miscellaneous Profile Options

A number of profile options categorized here as miscellaneous should be set at the site-level.

- **MO: Operating Unit** - Set this to your master organization.
- **OE: Item Validation Organization** - Set this to your master organization.
- **iSupport: Mandatory Layout Time Stamp** - Determines the value for the time stamp recorded on creation of a mandatory layout.
- **APPS_SERVLET_AGENT** - This is the URL that will be used to call JSP forms from applications menus. Set to the URL for the Apache server.

B

Seed Data

This appendix addresses that data that ships with Oracle *i*Support as seed data, or data that is shipped "out-of-the-box". Covered here are:

- Seeded Menus
- Seeded Functions
- Seeded User Responsibilities
- Seeded User Roles
- Seeded Permissions
- Oracle Knowledge Management Seed Data

B.1 Seeded Menus

This section lists menus associated with the application.

B.1.1 Oracle iSupport Menus

The table below, Oracle *i*Support Menus, shows the main menus and a description of each menu.

Table B–1 Oracle iSupport Menus

Menu	Description
IBU_A_FB_MENU	Administration > Survey
IBU_A_FORUM_MENU	Administration > Forum
IBU_A_FR_CATEGORY_MENU	Administration > Forum > Category
IBU_A_FR_FORUM_MENU	Administration > Forum > Forum

Table B–1 Oracle iSupport Menus

Menu	Description
IBU_A_FR_USERGROUP_MENU	Administration > Forum > Usergroup
IBU_A_PROFILE_MENU	Administration > Homepage
IBU_A_RM_MENU	Administration > Support > Request Management
IBU_A_ROOT_MENU	Administration tabs: User, Homepage, etc.
IBU_A_SUB	Administration > Homepage > Subscription
IBU_A_SUPPORT_MENU	Administration > Support
IBU_A_USER_MENU	Administration > User
IBU_BUS_USER_PROFILE_MENU	Profile menu for B2B user
IBU_BUS_USER_TOP_MENU	Top menu for iSupport B2B user
IBU_EMPL_ISUPPORT_MENU	iSupport menu for iSupport employee user
IBU_EMPL_REQ_MENU	Support menu for employee users
IBU_EMPL_USER_TOP_MENU	Top menu for iSupport employee user
IBU_HOME_MENU	iSupport > Home
IBU_IB_MENU	Home > Products
IBU_IND_USER_PROFILE_MENU	User profile menu for iSupport B2C user
IBU_IND_USER_TOP_MENU	Top menu for iSupport B2C user
IBU_INQ_MENU	iSupport > Account (for normal_user responsibility)
IBU_ISUPPORT_MENU	iSupport (primary user iSupport menu)
IBU_PRI_USER_REQ_MENU	iSupport > Support menu (for iSupport primary user)
IBU_PRI_USER_TOP_MENU	Top menu for iSupport primary user
IBU_PROFILE_ACCOUNT_MENU	Menu for account settings
IBU_PROFILE_COMPANY_MENU	Company profile menu
IBU_PROFILE_MENU	Menu for iSupport settings
IBU_PROFILE_USER_MENU	User profile menu
IBU_REQ_MENU	Home > Support
IBU_ROOT_MENU	iSupport (normal_user responsibility)
IBU_ROOT_PROFILE_MENU	Root menu for profile

B.1.2 Oracle iSupport Top Menus by User Type

The table below, Oracle *i*Support Top Menus by User Type, shows the top menus by user type.

Table B–2 Oracle iSupport Top Menus by User Type

Menu	Description
IBU_BUS_USER_TOP_MENU	Top menu for iSupport B2B User
IBU_EMPL_USER_TOP_MENU	Top menu for iSupport B2E User
IBU_IND_USER_TOP_MENU	Top menu for iSupport B2C User
IBU_PRI_USER_TOP_MENU	Top menu for iSupport Primary User
IBU_NORMAL_USER_TOP_MENU	Top menu for iSupport Administrator
IBU_GUEST_USER_TOP_MENU	Top menu for iSupport Guest User, not currently used

B.2 Oracle iSupport Functions

The table below, Oracle *i*Support Functions, shows the functions which are linked to menus, along with a description of each function.

Table B–3 Oracle iSupport Functions

Function	Description
IBU_ACCOUNT_CONTACT	not used
IBU_A_CAT_FN	Administration > Support > Technical Library
IBU_A_CM_FN	Administration > Support > Call Me
IBU_A_FB_LIST_FN	Administration > Survey > Feedback List
IBU_A_FR_CT_CREATE_FN	Administration > Category > Create
IBU_A_FR_CT_DELETE_FN	Administration > Category > Delete
IBU_A_FR_CT_MODSTATUS_FN	Administration > Category > Modify
IBU_A_FR_CT_RENAME_FN	Administration > Category > Rename
IBU_A_FR_FR_CREATE_FN	Administration > Forum > Create
IBU_A_FR_FR_DELETE_FN	Administration > Forum > Delete
IBU_A_FR_FR_MODATTR_FN	Administration > Forum > Modify Attribute
IBU_A_FR_FR_MODSTATUS_FN	Administration > Forum > Modify Status
IBU_A_FR_FR_MOVE_FN	Administration > Forum > Move
IBU_A_FR_FR_RENAME_FN	Administration > Forum > Rename
IBU_A_FR_MESSAGE_FN	Administration > Forum > Messages
IBU_A_FR_UG_ASSC_FN	Administration > Forum > Associate Usergroup
IBU_A_FR_UG_DISASSC_FN	Administration > Forum > Disassociate Usergroup
IBU_A_PZ_FN	Administration > Homepage > Personalize

Table B–3 Oracle iSupport Functions

Function	Description
IBU_A_RM_FN	Administration > Support > Request Management
IBU_A_RM_TEMPLATE_FN	Administration > Support > Request Management > Template
IBU_A_RPT_FN	Not used in generic product.
IBU_A_SUB_FN	Administration > Homepage > Subscription subtab
IBU_A_TM_FN	Administration > Subscription > Template
IBU_A_UG_FN	Administration > Support > Usergroup
IBU_A_USER_APPROVALS_FN	Administration > User > Pending Approvals
IBU_A_USER_FN	Administration > Users
IBU_CMN_FORUM	Forum tab
IBU_COMPANY_ADDRESS	Profile > Company address
IBU_COMPANY_ADMIN	Profile > Company Administrators
IBU_COMPANY_CONTACT_POINTS	Profile > Contact points of company
IBU_COMPANY_INFORMATION	Profile > Company Information
IBU_GEN_PREF	Profile > General Preferences
IBU_HLP_CALLME	Support > Call Me
IBU_HLP_FEEDBACK	Support > Survey
IBU_HOM_HOME	iSupport Home
IBU_INQ_ACCOUNT	Accounts
IBU_INQ_CONTRACTS	Accounts > Contracts
IBU_INQ_DEFECTS	Defects
IBU_INQ_INSTALLBASE	Install Base
IBU_INQ_INSTALLBASEREPORT	Install Base Report
IBU_INQ_INSTALLBASE_ADDPRODUCT	Install Base Add Product
IBU_INQ_INSTALLBASE_BUILT	Install Base as Built
IBU_INQ_INSTALLBASE_SUMMARY	Install Base Summary
IBU_INQ_INVOICES	Accounts > Invoices
IBU_INQ_ORDERS	Accounts > Orders
IBU_INQ_PAYMENTS	Accounts > Payments
IBU_INQ_RMAS	Accounts > Returns
IBU_PERSONAL_PROFILE	Profile button
IBU_PROFILE_CONTRACT	not used

Table B–3 Oracle iSupport Functions

Function	Description
IBU_PROFILE_GENERAL	Profile > User Profile > Support
IBU_REQ_ASKME	Search Knowledge Base
IBU_REQ_CREATESR	Support > Create Service Requests
IBU_REQ_VIEWSR	Support > View Service Requests
IBU_SYSTEM_ADD	not used
IBU_SYSTEM_ADM	not used
IBU_SYSTEM_CSI	not used
IBU_SYSTEM_LIC	not used
IBU_SYSTEM_PRF	not used
IBU_SYSTEM_ROL	not used
IBU_SYSTEM_USR	not used
IBU_USER_ACCOUNTS	Profile > User Profile > Accounts
IBU_USER_ADDRESSES	Profile > User Profile > Addresses
IBU_USER_CONTACTPOINTS	Profile > User Profile > Contact Points
IBU_USER_CONTRACTS	not used

B.3 Seeded User Responsibilities

The table below, Oracle *i*Support User Responsibilities, displays seeded user responsibilities and their descriptions for Release 11.5.6.

Table B–4 Oracle iSupport User Responsibilities

Responsibility	Description
IBU_BUSINESS_USER_RESP	iSupport Business (B2B) Users
IBU_INDIVIDUAL_USER_RESP	iSupport Individual (B2C) User
IBU_EMPLOYEE_USER_RESP	iSupport Employee (B2E) Users
IBU_PRIMARY_USER_RESP	iSupport Primary User
IBU_SYS_ADMIN	No longer used.
IBU_GUEST	For guest user, not currently used
IBU_NORMAL_USER	For iSupport Administrator user

B.4 Seeded User Roles

This section contains information about seeded roles and permissions, including:

B.4.1 User Roles

The table below, Oracle *i*Support User Roles, displays seeded user roles and their descriptions for Release 11.5.6.

Table B–5 Oracle iSupport User Roles

Role	Description
IBU_REG_USER	Contains permissions for standard B2B and B2C users.
IBU_B2B_PRIMARY_USER_MANAGEMENT	Contains permissions for standard iSupport Primary User.
IBU_EMPLOYEE	Contains permissions for standard Employee User.
IBU_SYSTEM_ADMIN	Contains permissions for standard iSupport Administrator.

B.4.2 Oracle iSupport User Roles by User Type

The table below, Oracle *i*Support User Roles by User Type, displays Oracle *i*Support typical users and the roles they must receive to receive their appropriate permissions.

Table B–6 Oracle iSupport User Roles by User Type

User	Roles Assigned
B2C, B2B users	IBU_REG_USER
Primary User	IBU_REG_USER, IBU_B2B_PRIMARY_USER_MANAGEMENT
Employee User	IBU_REG_USER, IBU_EMPLOYEE
iSupport Administrator	IBU_REG_USER, IBU_SYSTEM_ADMIN

B.5 Seeded Permissions

This section displays the user roles and the permissions that they contain.

The table below, Oracle *i*Support Permissions, displays the permissions associated with the seeded user roles.

Table B–7 Oracle iSupport Permissions

Role	Permissions
IBU_B2B_PRIMARY_USER_MANAGEMENT	IBU_USER_MGMT
	IBU_USER_MGMT_VIEW_COMPANY_USER
	IBU_USER_MGMT_VIEW_MY_ROLE
	JTF_PRIMARY_USER_SUMMARY
	IBU_ADMIN_UPDATE
	IBU_ADMIN_VIEW
IBU_REG_USER	CSI_ACCT_ACCESS_ONLY
	CSI_ADDI_ATTR_UPDATE
	CSI_ADDI_ATTR_VIEW
	CSI_CONTACT_DETAIL_UPDATE
	CSI_CONTACT_DETAIL_VIEW
	CSI_CONTRACT_UPDATE
	CSI_CONTRACT_VIEW
	CSI_CREATE_INST_UPDATE
	CSI_CREATE_INST_VIEW
	CSI_GENERAL_ATTRIB_CUST_ONLY
	CSI_INST_CONFIG_UPDATE
	CSI_INST_CONFIG_VIEW
	CSI_INST_GENERAL_UPDATE
	CSI_INST_GENERAL_VIEW
	CSI_LATEST_TRANSACTION_UPDATE
	CSI_LATEST_TRANSACTION_VIEW
	CSI_PARTY_CONTACT_UPDATE
	CSI_PARTY_CONTACT_VIEW
	CSI_PERZ_EDIT_UPDATE
	CSI_PERZ_EDIT_VIEW

Table B–7 Oracle iSupport Permissions

Role	Permissions
IBU_REG_USER (cont.)	CSI_PRICING_UPDATE
	CSI_PRICING_VIEW
	CSI_PROPERTY_READ
	CSI_REPAIR_ORDER_UPDATE
	CSI_REPAIR_ORDER_VIEW
	CSI_SEARCH_PRODUCT_UPDATE
	CSI_SEARCH_PRODUCT_VIEW
	CSI_SERVICE_REQUEST_UPDATE
	CSI_SERVICE_REQUEST_VIEW
	CSI_SHOW_EXT_CONTACTS
	CSI_SHOW_EXT_LOCATIONS
	CSI_SHOW_EXT_PARTIES
	CSI_SHOW_INST_CUSTOMER_MENU
	CSI_SPLIT_QUANTITY_UPDATE
	CSI_SPLIT_QUANTITY_VIEW
	CSI_TRANSACTION_DETAIL_UPDATE
	CSI_TRANSACTION_DETAIL_VIEW
	CSI_TRANSACTION_INSTANCE_UPDATE
	CSI_TRANSACTION_INSTANCE_VIEW
	CS_Freq_Used_Sol_View
	CS_Products_Add
	CS_Products_Delete
	CS_Products_Update
	CS_Products_View
	CS_Rec_Sol_View
	CS_Solution_View
	CS_Solution_View_All

Table B–7 Oracle iSupport Permissions

Role	Permissions
IBU_REG_USER (cont.)	IBU_CallMe
	IBU_Contracts_View
	IBU_Defects_View
	IBU_Forum
	IBU_Forum_View_Restrict
	IBU_Homepage
	IBU_Homepage_Update
	IBU_Invoices_View
	IBU_Orders_View
	IBU_Patch_View
	IBU_Payments_View
	IBU_Profile_Update
	IBU_Request_Close
	IBU_Request_Create
	IBU_Request_Escalate
	IBU_Request_Update
	IBU_Request_View
	IBU_Request_View_Company
	IBU_Returns_Add
	IBU_Returns_View
	IBU_Role_Mgt
	IBU_Survey_Create
	IBU_Technical_Library_View
	IBU_User_Mgt
IBU_SYSTEM_ADMIN	CS_Assoc_Ext_Obj_To_Sol
	CS_Assoc_Ext_Obj_To_Stmt
	CS_Categories_View

Table B–7 Oracle iSupport Permissions

Role	Permissions
IBU_SYSTEM_ADMIN (cont.)	CS_EMPLOYEE_CONTACT_ADD
	CS_Freq_Used_Def_Update
	CS_Freq_Used_Def_View
	CS_Freq_Used_Sol_View
	CS_PROPERTY_UPDATE
	CS_Products_Add
	CS_Products_Delete
	CS_Products_Report
	CS_Products_Update
	CS_Products_View
	CS_Rec_Sol_Update
	CS_Rec_Sol_View
	CS_Solution_Create
	CS_Solution_Delete
	CS_Solution_Status_Update
	CS_Solution_Update
	CS_Solution_View
	CS_Solution_View_All
	CS_Solution_View_B
	CS_Solution_View_Internal
	CS_Solution_View_Public
	CS_Solution_View_Restricted
	CS_Statement_Create
	CS_Statement_Delete
	CS_Statement_Global_Update
	CS_Statement_Update
	CS_Statement_View

Table B–7 Oracle iSupport Permissions

Role	Permissions
IBU_SYSTEM_ADMIN (cont.)	CS_Types_Edit
	CS_Types_View
	CS_Workflow_Setup_View
	IBU_Forum_Category_Edit
	IBU_Forum_Edit
	IBU_Forum_Messages_Edit
	IBU_Forum_User_Group_Edit
	IBU_Personalized_Homepage_Edit
	IBU_Request_Management_Edit
	IBU_Subscription_Edit
	IBU_Survey_Import
	IBU_TEMPLATE_MANAGEMENT
	IBU_USER_MGMT
	IBU_USER_MGMT_VIEW_ALL_ROLE
	IBU_USER_MGMT_VIEW_ALL_USER
	IBU_USER_MGMT_VIEW_COMPANY_USER
	IBU_USER_MGMT_VIEW_MY_ROLE
	IBU_User_Group_Edit
	JTF_DAC_Maintain
	JTF_REG_APPROVAL
	JTF_SECURITY_ASSIGN_ROLE
	IBU_ADMIN_UPDATE
	IBU_ADMIN_VIEW

B.6 Oracle Knowledge Management Seed Data

The following sections contain information on Oracle Knowledge Management seed data.

B.6.1 User Role to Permission Mapping

The following tables summarize Roles to Permissions mapping.

B.6.1.1 Oracle Knowledge Management Administrator

An Oracle Knowledge Management Administrator has all Oracle KM-specific permissions, including all setup and other process-oriented permissions.

The following table, Permissions for Oracle KM Administrators, lists the permissions associated with Oracle Knowledge Management Administrator role, CS_SYSTEM_ADMIN.

Table B–8 Permissions for Oracle KM Administrators

Permission	Description
CS_Solution_View	View Published Solutions
CS_Solution_Create	Create a Solution, Add Attachments and Comments
CS_Assoc_Ext_Obj_To_Sol	Associate External Object to a Solution
CS_Solution_Update	Update a Solution
CS_Solution_Delete	Delete a Solution
CS_Solution_View_ Internal	View Work-In-Progress Solutions
CS_Solution_Status_ Update	Update Solution Status
CS_Freq_Used_Def_View	View Frequently Used Definitions
CS_Freq_Used_Def_ Update	Update Frequently Used Definition
CS_Freq_Used_Sol_View	View Frequently Used Solutions
CS_Rec_Sol_View	View Recommended Solutions
CS_Rec_Sol_Update	Update Recommended Solutions
CS_Statement_View	View a Statement
CS_Statement_Create	Create a Statement
CS_Statement_Delete	Delete a Statement
CS_Statement_Update	Update a Statement
CS_Statement_Global_ Update	Update a Statement Being Linked to More Than One Solution

Table B–8 Permissions for Oracle KM Administrators

Permission	Description
CS_Type_View	View a Statement Type and a Solution Type
CS_Type_Edit	Create and Edit Solution Types and Statement Types
CS_Assoc_Ext_Obj_To_ Stmt	Associate an External Object to a Statement
CS_Workflow_Setup_View	View Workflow Setup Screens
CS_Categories_View	View Categories

B.6.1.2 Oracle KM Knowledge Worker

A knowledge worker creates/edits/technically reviews information in Oracle Knowledge Management. The following table, Roles and Permissions Associated with Oracle KM Workers, lists role and permissions associated with an Oracle Knowledge Management Worker

.

Table B–9 Role and Permissions Associated with Oracle KM Workers

Role	Permissions/Description
CS_KNOWLEDGE_ WORKER	CS_Solution_View (*View Published Solutions*)
	CS_Solution_Create (*Create a Solution, Add Attachments and Comments)*
	CS_Assoc_Ext_Obj_To_Sol (*Associate External Object to a Solution*)
	CS_Solution_Update (*Update a Solution*)
	CS_Solution_Delete (*Delete a Solution)*
	CS_Solution_View_Internal (*View Work-In-Progress Solutions*)
	CS_Solution_Status_Update (*Update Solution Status)*
	CS_Freq_Used_Def_View (*View Frequently Used Definitions*)
	CS_Freq_Used_Sol_View (*View Frequently Used Solutions*)
	CS_Rec_Sol_View (*View Recommended Solutions*)
	CS_Statement_View (*View a Statement*)
	CS_Statement_Create (*Create a Statement*)
	CS_Statement_Delete (*Delete a Statement*)
	CS_Statement_Update (*Update a Statement*)
	CS_Type_View (*View a Statement Type and a Solution Type*)
	CS_Type_Edit (*Create and Edit Solution Types and Statement Types*)
	CS_Assoc_Ext_Obj_To_Stmt (*Associate an External Object to a Statement*)

B.6.1.3 Oracle KM Agent

An Oracle Knowledge Management Agent interfaces with the customers directly (on the phone) or indirectly (online) to record their problems and provides them existing solutions or creates new solutions.

The following table, Roles and Permissions Associated with Oracle KM Agent, lists role and permissions associated with an Oracle Knowledge Management Agent.

Table B–10 Role and Permissions Associated with Oracle KM Agent

Role/Description	Permissions/Description
CS_SUPPORT_AGENT	CS_Solution_View (*View Published Solutions*)
	CS_Solution_Create (*Create a Solution, Add Attachments and Comments)*
	CS_Solution_View_Internal (*View Work-In-Progress Solutions*)
	CS_Statement_Create (*Create a Statement*)
	CS_Type_View (*View a Statement Type and a Solution Type*)
	CS_Statement_View (*View a Statement*)
	CS_Freq_Used_Sol_View (*View Frequently Used Solutions*)

C

Oracle iSupport APIs

This chapter describes the public APIs that are a part of Oracle *i*Support. Topics include:

C.1 Oracle CRM API Overview

Oracle CRM Division classifies its APIs into the following types:

C.1.0.1 Private APIs

Private APIs are for internal development use only. Details are not provided to anyone outside of the immediate development environment, nor are they intended for use by anyone outside of the CRM development environment.

C.1.0.2 Public APIs

Public APIs are designed so that customers and / or Oracle consultants can interface non-Oracle systems into CRM or extend the functionality of the base products. However, unless published, they are not supported by Oracle, and users exploit them at their own risk.

There are two types of Public APIs:

Public, published APIs - Oracle guarantees that this type will remain valid from release to release and that Oracle-released software patches will not alter the API behavior. Public, published APIs are supported by Oracle to the same extent as released software.

Public, non-published APIs are not guaranteed by Oracle. Oracle makes no guarantees regarding the consistency of naming, usage, or behavior (public or private) between releases. It is also possible that a patch could alter any characteristic of any non-published CRM API. As such, those who choose to use these APIs do so at their own risk. Having said that, Oracle does attempt to minimize all changes to public APIs, even if not published.

C.2 Oracle iSupport API Overview

Oracle *i*Support has one public, published API package:

- oracle.apps.ibu.requests

C.3 Package oracle.apps.ibu.requests Overview

This package provides support for the service request functionality in Oracle *i*Support.

C.3.1 Package oracle.apps.ibu.requests Interface Summary

The following table, Package oracle.apps.ibu.requests Interface Summary, shows the public, published interfaces within the package oracle.apps.ibu.requests.

Table C–1 Package oracle.apps.ibu.requests Interface Summary

Interface	Summary
ServiceRequest	Defines a set of methods that can be applied to a service request.

Table C–1 Package oracle.apps.ibu.requests Interface Summary

Interface	Summary
ServiceRequestUtil	Defines a set of methods that helps retrieve relevant data about a service request.
SRConstant	Defines the constant that can be used in JSP and in constructing a view object.

C.3.2 Package oracle.apps.ibu.requests Class Summary

The following table, Package oracle.apps.ibu.requests Class Summary, shows the public, published classes within the service request package.

Table C–2 Package oracle.apps.ibu.requests Class Summary

Class Name	Summary
ServiceRequestFactory	Creates an appropriate instance of ServiceRequest and ServiceRequestUtil interfaces based on conditions such as Oracle Rollout flag, etc.
ServiceRequestInfo	This is a data object that stores information about a service request.
NoteInfo	This is a data object that holds note information attached to a service request.
ProductInfo	This is a data object that stores product information.
ViewServiceRequest	This is an abstract class used to search service requests.

C.4 Interface ServiceRequest

The interface ServiceRequest defines a set of methods that can be applied to a service request. Classes implementing this interface will be instantiated by ServiceRequestFactory class.

C.4.1 ServiceRequest Field Information

The table below is the field information for the ServiceRequest interface.

public static java.lang.String	RCS_ID
public static final boolean	RCS_ID_RECORDED

C.4.2 ServiceRequest Method Index

The table below is a method index of this interface.

	Method	Description
void	close	Closes a service request.
void	create	Creates a service request.
void	escalate	Escalates a service request.
IDNamePair[]	fetchAttachment	Fetches the attachments associated with a service request.
IDNameNumber[]	fetchAttachment2	Fetches the attachments associated with a service request.
java.lang.String[][]	fetchBugInfo	Fetches related bug information for a service request.
ContactInfo[]	fetchContactInfo	Fetches the contact information about a service request.
ServiceRequestInfo	fetchDetail	Fetches the detail of a service request from a service request number.
void	fetchNotes	Fetches all notes attached to an SR.
void	fetchNoteSolutionAudit	Fetch the note, solution, and audit history together.
IDNamePair	fetchPrimaryContractInfo	Fetch the primary contract information about a service request.
boolean	isClosed	Check if a service request is closed.
boolean	isReopenOK	Test if one closed service request can be reopend or not.
void	sendEmail	Sends the confirmation of the service request to the email address.
void	update	Updates a service request with a note and/or attached files.

C.4.3 ServiceRequest Method Detail

Following are the details of the methods in the ServiceRequest interface.

close

public void **close** (IBU Parameters ibuParam, ServiceRequestInfo srInfo)

Closes a service request.

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

srInfo - service request information

create

public void **create** (IBU Parameters ibuParam, ServiceRequestInfo srInfo)

Creates a service request.

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

srInfo - service request information

escalate

public void **escalate** (IBU Parameters ibuParam, ServiceRequestInfo srInfo)

Escalates a service request.

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

srInfo - service request information

fetchAttachment

public IDNamePair [] **fetchAttachment** (IBUParameters ibuParam, long srID)

Fetches the attachments associated with a service request.

Throws: java.lang.Exception if error.

Returns: the attachments of the service request

Parameters:

ibuParam - standard IBU parameter

srID - the service request id

fetchAttachment2

public IDNameNumber [] **fetchAttachment2** (IBUParameters ibuParam, long srID)

Fetches the attachments associated with a service request.

Throws: java.lang.Exception if error.

Returns: the attachments of the service request. id = file ID, name = name, number = description

Parameters:

ibuParam - standard IBU parameter

srID - the service request id

fetchBugInfo

public java.lang.String [] [] **fetchBugInfo** (IBUParameters ibuParam, long srID)

Fetches the related bug information for a given service request.

Throws: java.lang.Exception if error.

Returns: the String containing the bug information

Parameters:

ibuParam - standard IBU parameter

srID - the service request id

fetchContactInfo

public ContactInfo [] **fetchContactInfo** (IBUParameters ibuParam, java.lang.String srNum, boolean primary)

Fetches the contact information about a service request.

Throws: java.lang.Exception if error.

Returns: the contact information about a service request

Parameters:

ibuParam - standard IBU parameter

srNum - the service request number

fetchDetail

public ServiceRequestInfo **fetchDetail** (IBUParameters ibuParam, java.lang.String srNum)

Fetches the detail of a service request from the service request number.

Throws: java.lang.Exception if error.

Returns: the service request information

Parameters:

ibuParam - standard IBU parameter

srNum - the service request number

fetchNotes

public void **fetchNotes** (IBUParameters ibuParam, ServiceRequestInfo srInfo, boolean ascending)

Fetches all notes attached to a service request.

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

srInfo - the service request information; the notes of the service request are stored in srInfo.notes

ascending - the order of the result

fetchNoteSolutionAudit

public void **fetchNoteSolutionAudit** (IBUParameters ibuParam, ServiceRequestInfo srInfo, boolean ascending, boolean showDetail)

Fetches the note, solution, and audit history together. The result is stored in srInfo.otherInfo1 as a String array format.

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

srInfo - the service request information

ascending - the order of the result

fetchPrimaryContactInfo

public IDNamePair **fetchPrimaryContactInfo** (IBUParameters ibuParam, java.lang.String srNum)

Fetches the primary contact information about a service request.

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

srNum - the service request number

isClosed

public boolean **isClosed** (IBU Parameters ibuParam, ServiceRequestInfo srInfo)

Checks whether a service request is closed or not.

Throws: java.lang.Exception if error.

Returns: true if the service request is closed, false if it is open.

Parameters:

ibuParam - standard IBU parameter

srInfo - the service request information; the notes of the service request are stored in srInfo.notes

isReopenOK

public boolean **isReopenOK** (IBU Parameters ibuParam, long srID)

Tests if one closed service request can be reopened or not.

Throws: java.lang.Exception if error.

Returns: true if the service request can be reopened, false if it cannot be reopened.

Parameters:

ibuParam - standard IBU parameter

srID - the service request id

sendEmail

public void **sendEmail** (IBU Parameters ibuParam, java.lang.String srNum)

Sends the confirmation of the service request to the e-mail address.

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

email - the email address

msgbody - the email message body (includes confirmation of the service request)

subject - subject of the email

update

public void **update** (IBU Parameters ibuParam, ServiceRequestInfo srInfo)

Updates a service request with a note and/or attached files.

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

srInfo - the service request information; the notes of the service request are stored in srInfo.notes

C.5 Interface ServiceRequestUtil

The interface Service RequestUtil defines a set of methods that help get relevant data about a service request. Classes implementing this interface will be instantiated by ServiceRequestFactory class.

C.5.1 ServiceRequestUtil Field Information

The table below is the field information for the ServiceRequestUtil interface.

static String	RCS_ID
static boolean	RCS_ID_RECORDED

C.5.2 ServiceRequestUtil Method Index

The table below is a method index of this interface.

	Method	Description
void	addAttachment	Adds attachments to a service request
void	addKBLink	Adds knowledge base link to service request.
IDNamePair[]	fetchDateOptions	Returns the service request date range options.
ProductInfo[]	fetchInstalledBaseProducts	Fetches all Install Base products based on the search conditions.
IDNameNumber[]	fetchInvItems	Fetches the available inventory items based on search criteria and range.
String []	fetchItemVersion	Fetches all valid versions associated to an inventory item.
KeyDescPair[]	fetchNoteType	Fetches all service request note types.
IDNameNumber []	fetchPlatform	Fetches all available platforms.
KeyDescPair []	fetchProblemCodes	Fetches all valid problem codes.
IDNamePair []	fetchProductVersion	Fetches all valid versions associated to a product.
IDNamePair []	fetchRequestTypes	Fetches all valid service request types.
IDNamePair []	fetchSeverities	Fetches all valid service request severities.
IDNamePair []	fetchStatuses	Fetches all valid service request statuses.
IDNamePair []	fetchUrgencies	Fetches all valid service request urgencies.
String	lookupContract	Looks up the contract number of a contract id.
String	lookupInventoryItem	Looks up the inventory item name and description.
long	lookupInventoryItemFromProduct	Looks up the inventory item id of a product.
String	lookupNoteDetail	Looks up the note detail of a note.
String	lookupOwnerName	Looks up the owner name from the resource id.
String	lookupPlatform	Looks up the name and description of a platform.
String	lookupProblem	Looks up the problem code and description.
String	lookupProduct	Looks up the product name and description.

	Method	Description
String	lookupProductVersion	Looks up the product version name for the version id.
String	lookupRequestType	Looks up the request type name of a request type id.
String	lookupSeverity	Looks up the severity name.
String	lookupStatus	Looks up the status name of a status id.
String	lookupUrgency	Looks up the urgency name.

C.5.3 ServiceRequestUtil Method Detail

Following are the details of the methods in the ServiceRequestUtil interface.

addAttachment

public void **addAttachment** (IBUParameters ibuParam, IDNamePair [] attachFiles, long srID, long loginID)

Adds attachments to a service request.

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

attachFiles - the fileID and description

srID - the service request ID

loginID - the login ID

addKBLink

public void **addKBLink** (IBUParameters ibuParam, String docID, long srID, boolean success)

Adds knowledge base link to a service request.

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

docID - the document ID in CSV format

srID - the service request ID

success - successful document or unsuccessful document

fetchDateOptions

public IDNamePair [] **fetchDateOptions**

Returns the service request date range options.

fetchInstalledBaseProducts

public ProductInfo [] **fetchInstalledBaseProducts** (IBUParameters ibuParam, Hashtable params, int startPage, int batchSize, int[] totalCount)

Fetches the Install Base products based on search conditions.

Throws: java.lang.Exception if error.

Parameters:

conn - the OracleConnection

params - the parameters for searching

accountID - the account ID (mandatory)

productName - the product name (optional)

productDesc - the product description (optional)

fetchInvItems

public IDNameNumber [] **fetchInvItems** (IBUParameters ibuParam, java.util.Hashtable params, int startPage, int batchSize, int[] totalCount)

Fetches the available inventory items based on search criteria and range.

Throws: java.lang.Exception if error.

Returns: the array of IDNameNumber, where ID is the inventory item ID, Name is the iten name, Number is the item description

Parameters:

ibuParam - standard IBU parameter

params - search criteria

invItemName - inventory item name

invItemDesc - inventory item description

startPage - the start page number, 0-based

batchSize - the number of records per page

totalCount - the total number of records satisfying the search criteria

fetchItemVersion

public String [] **fetchItemVersion** (IBUParameters ibuParam, long itemID)

Fetches all valid versions associated to an inventory item.

Throws: Exception if error.

Returns: the valid versions

Parameters:

ibuParam - standard IBU parameter

productID - the inventory item id

fetchNoteType

public KeyDescPair [] **fetchNoteType** (IBUParameters ibuParam)

Fetches all service request note types.

Returns: an array of KeyDesc pair, with note type code and note type meaning

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

fetchPlatform

public IDNameNumber [] **fetchPlatform** (IBUParameters ibuParam, String findName, String findDesc, int startPage, int batchSize, int [] totalCount)

Fetches the available platform based on search criteria.

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

findName - the search name

findDesc - the search description

startPage - the start page, 0-based

batchSize - the number of records per page

totalCount - the total number of records satisfying the search criteria

fetchProblemCodes

public KeyDescPair [] **fetchProblemCodes** (IBUParameters ibuParam)

Fetches all valid problem codes.

Throws: Exception if error.

Returns: the valid problem codes.

Parameters:

ibuParam - standard IBU parameter

fetchProductVersion

public IDNamePair [] fetchProductVersion (IBUParameters ibuParam, long productID)

Fetches all valid versions associated to a product.

Throws: Exception if error.

Returns: the valid versions

Parameters:

ibuParam - standard IBU parameter

productID - the product id

fetchRequestTypes

public IDNamePair **fetchRequestTypes** (IBUParameters ibuParam)

Fetches all valid service request types.

Throws: Exception if error.

Parameters:

ibuParam - standard IBU parameter

fetchSeverities

public IDNamePair [] **fetchSeverities** (IBUParameters ibuParam)

Fetches all valid service request severities.

Throws: Exception if error.

Returns: the valid service request severities.

Parameters:

ibuParam - standard IBU parameter

fetchStatuses

public IDNamePair [] **fetchStatuses** (IBUParameters ibuParam)

Fetches all valid service request statuses.

Throws: Exception if error.

Returns: the valid service request statuses.

Parameters:

ibuParam - standard IBU parameter

fetchUrgencies

public IDNamePair [] **fetchUrgencies** (IBUParameters ibuParam)

Fetches all valid service request statuses.

Throws: Exception if error.

Returns: the valid service request urgencies.

Parameters:

ibuParam - standard IBU parameter

lookupContract

public java.lang.String **lookupContract** (IBUParameters ibuParam, java.lang.String contractID)

Looks up the contract number of a contract id.

Returns: the version name

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

version - the contract ID

lookupInventoryItem

public java.lang.String **lookupInventoryItem** (IBUParameters ibuParam, long itemID)

Looks up the inventory item name and description.

Returns: the name and description of the inventory item ID

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

itemID - the inventory item ID

lookupInventoryItemFromProduct

public long **lookupInventoryItemFromProduct** (IBUParameters ibuParam, long productID)

Looks up the inventory item ID of a product.

Returns: the inventory ID

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

productID - the product ID

lookupNoteDetail

public java.lang.String **lookupNoteDetail** (IBUParameters ibuParam, long noteID)

Looks up the note detail.

Returns: the note detail

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

noteID - the note ID

lookupOwnerName

public java.lang.String **lookupOwnerName** (IBUParameters ibuParam, String resourceID, String resourceType)

Looks up the service request owner name from the resource ID.

Returns: the resource name

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

itemID - the resource ID

lookupPlatform

public java.lang.String **lookupPlatform** (IBUParameters ibuParam, long platformID)

Looks up the name and description of a platform.

Returns: the platform name and description

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

platformID - the platform ID

lookupProblem

public java.lang.String **lookupProblem** (IBUParameters ibuParam, String problemCode)

Looks up the prblem code and description.

Returns: the problem code and description

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

problemCode - the problem code

lookupProduct

public java.lang.String **lookupProduct** (IBUParameters ibuParam, long productID)

Looks up the product name and description.

Returns: the product name and description

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

productID - the product ID

lookupProductVersion

public java.lang.String **lookupProductVersion** (IBUParameters ibuParam, long versionID)

Looks up the product version name for the version ID.

Returns: the version name

Throws: java.lang.Exception if error.

Parameters:

ibuParam - standard IBU parameter

version - the version ID

lookupRequestType

public String **lookupRequestType** (IBUParameters ibuParam, long typeID)

Looks up the request type name of a request type ID.

Parameters:

ibuParam - standard IBU parameter

typeID - the request type ID

Returns: the request type name

Throws: Exception if error

lookupSeverity

public java.lang.String **lookupSeverity** (IBUParameters ibuParam, long severityID)

Looks up the severity name.

Parameters:

ibuParam - standard IBU parameter

urgencyID - the severity ID

Returns: the severity name

Throws: java.lang.Exception if error

lookupStatus

public String **lookupStatus** (IBUParameters ibuParam, long statusID)

Looks up the status name of a status ID.

Parameters:

ibuParam - standard IBU parameter

typeID - the status ID

Returns: the status name

Throws: Exception if error

lookupUrgency

public java.lang.String **lookupUrgency** (IBUParameters ibuParam, long urgencyID)

Looks up the urgency name.

Parameters:

ibuParam - standard IBU parameter

urgencyID - the urgency ID

Returns: the urgency name

Throws: java.lang.Exception if error

C.6 Interface SRConstant

The interface SRConstant defines the constant that can be used in JSP and in constructing a view object.

C.6.1 SRConstant Field Summary

The following table shows the field summary for this interface.

		Description
static java.lang.String	ACCOUNT_ID	Account ID
static java.lang.String	ASC	Ascending order
static java.lang.String	CALLER_TYPE	Caller type
static java.lang.String	CALLER_TYPE_VALUES	Caller type values
static java.lang.String	COLUMN	Columns that allow to be used in the selected column, filtering condition, and the order by columns. **Important:** the order of this array cannot be changed. If you append new items into this array, you need to update ViewServiceRequest.COLUMN, ViewServiceRequest.COLUMN2, ViewServiceRequest.VIEW, and the populate method.
static java.lang.String	CONTRACT_ID	Contract ID
static java.lang.String	CREATION_DATE	Creation date
static java.lang.String	CUSTOMER_ID	Customer ID
static java.lang.String	DESC	Descending order
static java.lang.String	EMPLOYEE_ID	Employee ID
static java.lang.String	HELPDESK_NUM	Helpdesk number
static java.lang.String	INV_ITEM_ID	Inventory item ID
static java.lang.String	LAST_UPDATE_DATE	Last update date
static java.lang.String	PARTY_ID	Contact party ID

		Description
static java.lang.String	PRODUCT_ID	Customer product ID
static java.lang.String	PROJECT_NUM	Project number
static java.lang.String	RCS_ID	
static java.lang.String	RCS_ID_RECORDED	
static java.lang.String	SEVERITY_ID	Severity ID
static java.lang.String	SOURCE	Command - source of invocation
static java.lang.String	SR_NUM	Service request number
static java.lang.String	STATUS_ID	Status ID
static java.lang.String	SUMMARY	Service request summary
static java.lang.String	TYPE_ID	Request type ID
static java.lang.String	URGENCY_ID	Urgency ID
static java.lang.String	lookupStatus	Looks up the status name of a status id.
static java.lang.String	lookupUrgency	Looks up the urgency name.

C.7 Class ServiceRequestFactory

The public class ServiceRequestFactory creates an appropriate instance of ServiceRequest and ServiceRequestUtil interfaces based on conditions such as Oracle Rollout flag, etc. It is recommended not to instantiate ServiceRequest and ServiceRequestUtil object yourself.

Dependency

oracle.apps.ibu.contract.ContractUtil

C.7.1 ServiceRequestFactory Field Information

The table below is the field information for the ServiceRequestFactory class.

public static java.lang.String	RCS_ID
public static final boolean	RCS_ID_RECORDED

C.7.2 ServiceRequestFactory Constructor Information

public ServiceRequestFactory

C.7.3 ServiceRequestFactory Method Information

The table below is contains method information for this class.

	Method	Description
public static Service Request	createServiceRequest	Creates a ServiceRequest object.
public static ServiceRequestUtil	createServiceRequestUtil	Creates a ServiceRequestUtil object.

Methods Inherited from class java.lang.Object

clone, equals, finalize, getClass, hashCode, notify, notifyAll, toString, wait, wait, wait

C.8 Class ServiceRequestInfo

The public class ServiceRequestInfo extends java.lang.Object. This class stores information about a service request.

C.8.1 ServiceRequestInfo Field Information

The table below is the field information for the public ServiceRequestInfo class.

Table C–3 Class ServiceRequestInfo Field Information

	Field
java.lang.String	accountNum
IDNamePair []	attachedFiles
java.lang.String	attribute1

Table C–3 Class ServiceRequestInfo Field Information

	Field
java.lang.String	attribute10
java.lang.String	attribute11
java.lang.String	attribute12
java.lang.String	attribute13
java.lang.String	attribute14
java.lang.String	attribute15
java.lang.String	attribute2
java.lang.String	attribute3
java.lang.String	attribute4
java.lang.String	attribute5
java.lang.String	attribute6
java.lang.String	attribute7
java.lang.String	attribute8
java.lang.String	attribute9
ContactInfo []	contactInfos
java.lang.String	contract
java.lang.String	contractID
java.lang.String	customerName
java.lang.String	DBVersion
java.sql.Timestamp	expectedResolutionDate
KeyDescPair []	extensions
long	mAccountID
java.lang.String	mCallerType
java.lang.String	mComments
java.lang.String	mContactBy
java.lang.String	mContactInfo
java.lang.String	mContactName

Table C–3 Class ServiceRequestInfo Field Information

	Field
long	mContactPartyID
long	mContactPointID
java.lang.String	mCpRevision
long	mCpRevisionID
long	mCustomerID
java.sql.Timestamp	mDateLogged
long	mEmployeeID
java.lang.String	mFileIDList
java.lang.String	mHelpDeskNO
long	mID
boolean	mIsCancelledByUser
long	mItem
java.lang.String	mItemDesc
java.lang.String	mItemRevision
java.lang.String	mKbUsefulIDList
java.lang.String	mLanguage
java.lang.String	mLastUpdated
java.lang.String	mLoggedBy
long	mLoginID
java.lang.String	mLongDesc
java.lang.String	mNumber
java.lang.String	mOwner
java.lang.String	mOwnerID
long	mPartyID
java.lang.String	mProblemCode
java.lang.String	mProblemCodeID
long	mProduct

Table C–3 Class ServiceRequestInfo Field Information

	Field
java.lang.String	mProductDesc
java.lang.String	mRequestType
long	mRequestTypeID
java.lang.String	mSeverity
long	mSeverityID
java.lang.String	mShortDesc
java.lang.String	mStatus
long	mStatusID
long	mSystemID
java.lang.String	mUrgency
long	mUrgencyID
long	mUserID
NoteInfo []	notes
java.lang.String	noteType
java.sql.Timestamp	obligationDate
java.lang.String	OSVersion
java.lang.Object []	otherInfo1
java.lang.String	platform
long	platformID
java.lang.String	projectNum
static java.lang.String	RCS_ID
static boolean	RCS_ID_RECORDED
java.lang.String	shortCode

C.8.2 ServiceRequestInfo Constructor Information

public ServiceRequestInfo ( ) Constructor

C.8.3 ServiceRequestInfo Method Index

The table below is a method index of this class.

	Method	Description
long	getAccountID	Returns the account number.
java.lang.String	getAttribute1	
java.lang.String	getAttribute10	
java.lang.String	getAttribute11	
java.lang.String	getAttribute12	
java.lang.String	getAttribute13	
java.lang.String	getAttribute14	
java.lang.String	getAttribute15	
java.lang.String	getAttribute2	
java.lang.String	getAttribute3	
java.lang.String	getAttribute4	
java.lang.String	getAttribute5	
java.lang.String	getAttribute6	
java.lang.String	getAttribute7	
java.lang.String	getAttribute8	
java.lang.String	getAttribute9	
java.lang.String	getCallerType	
java.lang.String	getContactBy	Returns the contact method.
java.lang.String	getContactInfo	Returns the contact information
java.lang.String	getContactName	Returns the contact name.
long	getContactPartyID	Returns the contact party id.
long	getContactPointID	Returns the contact point id.
java.lang.String	getCpRevision	Returns the revision.
long	getCpRevisionID	Returns the revision id.
long	getCustomerID	Returns the customer id.

	Method	Description
java.sql.Timestamp	getDateLogged	Gets the creation date of the service request.
java.lang.String	getDBVersion	Gets and database version.
long	getEmployeeID	Returns the employee id.
java.lang.String	getFileIDList	Returns the attached file id list.
java.lang.String	getHelpdeskNO	Returns my reference number.
long	getID	Gets the service request id.
boolean	getIsCancelledByUser	Return true is the service request is cancelled by the user.
long	getItem	Returns the item id.
java.lang.String	getItemDesc	Returns the item description.
java.lang.String	getItemRevision	Returns the item revision
java.lang.String	getKbNotUsefulIDList	Returns not useful solution id list from knowledge base.
java.lang.String	getKbUsefulIDList	Returns useful solution id list from knowledge base.
java.lang.String	getLanguage	Returns the language.
java.sql.Timestamp	getLastUpdated	Gets the last update date of the service request.
java.lang.String	getLoggedBy	Returns the user id of the user who logged the request.
long	getLoginID	
java.lang.String	getLongDesc	Returns the service request long description.
java.lang.String	getNumber	Gets the service request number.
java.lang.String	getOSRevision	Gets the operating system version.
java.lang.String	getOwner	Returns the owner name of the service request.
java.lang.String	getOwnerID	Returns the owner id of the service request.
long	getPartyID	Returns the party id
java.lang.String	getPlatform	Returns the platform.
long	getPlatformID	Returns the platform id.
java.lang.String	getProblemCode	Returns the service request problem code description.
java.lang.String	getProblemCodeID	Returns the service request problem code id.
long	getProduct	Returns the product id.
java.lang.String	getProductDesc	Returns the product description.

	Method	Description
java.lang.String	getRequestType	Returns the service request type.
long	getRequestTypeID	Returns the service request type id.
java.lang.String	getSeverity	Returns the service request severity.
long	getSeverityID	Returns the service request severity id.
java.lang.String	getShortDesc	Returns the service request summary.
java.lang.String	getStatus	Returns the service request status.
long	getStatusID	Returns the service request status id.
long	getSystemID	Returns the system id (CSI)
java.lang.String	getUrgency	Returns the service request urgency.
long	getUrgencyID	Returns the service request urgency id.
void	setAccountID	Sets the account number.
void	setAttribute1	
void	setAttribute10	
void	setAttribute11	
void	setAttribute12	
void	setAttribute13	
void	setAttribute14	
void	setAttribute15	
void	setAttribute2	
void	setAttribute3	
void	setAttribute4	
void	setAttribute5	
void	setAttribute6	
void	setAttribute7	
void	setAttribute8	
void	setAttribute9	
void	setCallerType	
void	setContactBy	Sets the contact method.

	Method	Description
void	setContactInfo	
void	setContactName	Sets the contact name.
void	setContactPartyID	Sets the contact party id.
void	setContactPointID	Sets the contact point id.
void	setCpRevision	
void	setCpRevisionID	
void	setCustomerID	Sets the customer id.
void	setDateLogged	Sets the service request creation date.
void	setEmployeeID	Sets the employee id.
void	setFileIDList	Set attached file id list.
void	setHelpdeskNO	Set my reference number.
void	setID	Set the service request id.
void	setIsCancelledByUser	Set to true if the service request is cancelled by user.
void	setItem	Set the item id.
void	setItemDesc	Set the item description.
void	setItemRevision	Set the item revision.
void	setKbNotUsefulIDList	Set not useful solution id list from knowledge base.
void	setKbUsefulIDList	Set useful solution id list from knowledge base.
void	setLanguage	Set the language
void	setLastUpdated	Sets the last update of the service request.
void	setLoggedBy	Public accessors for setting the user id who logged the service request.
void	setLoginID	
void	setLongDesc	Set the service request long description.
void	setNumber	Sets the service request number.
void	setOSRevision	Set the operating system version.
void	setOwner	Public accessors for setting the owner of the service request.

	Method	Description
void	setOwnerID	Public accessors for setting the user id of the owner of the service request.
void	setPartyID	Set the party id.
void	setPlatform	Set the platform.
void	setPlatformID	Set the platform id.
void	setProblemCode	Set the service request problem code description.
void	setProblemCodeID	Set the service request problem code id.
void	setProduct	Set the product id.
void	setProductDesc	Set the product description.
void	setRDBMSRevision	Set the database version.
void	setRequestType	Set the service request type.
void	setRequestTypeID	Set the service request type id.
void	setSeverity	Set the service request severity.
void	setSeverityID	Set the service request severity id.
void	setShortDesc	Set the service request summary.
void	setStatus	Set the service request status.
void	setStatusID	Set the service request status id.
void	setSystemID	Set the system id.
void	setUrgency	Set the service request urgency.
void	setUrgencyID	Set the service request urgency id.
void	setUserID	Set the user id.

C.8.4 ServiceRequestInfo Method Detail

Following is the method detail for this class.

getAccountID

public long **getAccountID** ()

Returns the account number.

getAttribute1
public java.lang.String **getAttribute1** ()

getAttribute10
public java.lang.String **getAttribute10** ()

getAttribute11
public java.lang.String **getAttribute11** ()

getAttribute12
public java.lang.String **getAttribute12** ()

getAttribute13
public java.lang.String **getAttribute13** ()

getAttribute14
public java.lang.String **getAttribute14** ()

getAttribute15
public java.lang.String **getAttribute15** ()

getAttribute2
public java.lang.String **getAttribute2** ()

getAttribute3
public java.lang.String **getAttribute3** ()

getAttribute4
public java.lang.String **getAttribute4** ()

getAttribute5
public java.lang.String **getAttribute5** ()

getAttribute6
public java.lang.String **getAttribute6** ()

getAttribute7
public java.lang.String **getAttribute7** ()

getAttribute8
public java.lang.String **getAttribute8** ()

getAttribute9
public java.lang.String **getAttribute9** ()

getCallerType
public java.lang.String **getCallerType** ()

getContactBy
public java.lang.String **getContactBy** ()

Returns the contact by method.

getContactInfo
public java.lang.String **getContactInfo** ()

Returns the contact information

getContactName
public java.lang.String **getContactName** ()

Returns the contact name.

getContactPartyID
public long **getContactPartyID** ()

Returns the contact party id.

getContactPointID
public long **getContactPointID** ()

Returns the contact point id.

getCpRevision
public java.lang.String **getCpRevision** ()

Returns the revision.

getCpRevisionID

public long **getCpRevisionID** ()

Returns the revision id.

getCustomerID

public long **getCustomerID** ()

Returns the customer id.

getDateLogged

public java.sql.Timestamp **getDateLogged** ()

Gets the creation date of the service request.

getDBVersion

public java.lang.String **getDBVersion** ()

Gets the RDBMS version.

getEmployeeID

public long **getEmployeeID** ()

Returns the employee id.

getFileIDList

public java.lang.String **getFileIDList** ()

Returns the attached file id list.

getHelpdeskNO

public java.lang.String **getHelpdeskNO** ()

Returns my reference number.

getID

public long **getID** ()

Gets the service request id.

getIsCancelledByUser

public boolean **getIsCancelledByUser** ()

Return true is the service request is cancelled by the user.

getItem

public long **getItem** ()

Returns the item id.

getItemDesc

public java.lang.String **getItemDesc** ()

Returns the item description.

getItemRevision

public java.lang.String **getItemRevision** ()

Returns the item revision

getKbNotUsefullIDList

public java.lang.String **getKbNotUsefulIDList** ()

Returns not useful solution id list from knowledge base.

getKbUsefullIDList

public java.lang.String **getKbUsefulIDList** ()

Returns useful solution id list from knowledge base.

getLanguage

public java.lang.String **getLanguage** ()

Returns the language.

getLastUpdated

public java.sql.Timestamp **getLastUpdated** ()

Gets the last update date of the service request.

getLoggedBy

public java.lang.String **getLoggedBy** ()

Returns the user id of the user who logged the request.

getLoginID

public long **getLoginID** ()

getLongDesc

public java.lang.String **getLongDesc** ()

Returns the service request long description.

getNumber

public java.lang.String **getNumber** ()

Gets the service request number.

getOSRevision

public java.lang.String **getOSRevision** ()

Gets the operating system version.

getOwner

public java.lang.String **getOwner** ()

Returns the owner name of the service request.

getOwnerID

public java.lang.String **getOwnerID** ()

Returns the owner id of the service request.

getPartyID

public long **getPartyID** ()

Returns the party id

getPlatform

public java.lang.String **getPlatform** ()

Returns the platform.

getPlatformID
public long **getPlatformID** ()

Returns the platform id.

getProblemCode
public java.lang.String **getProblemCode** ()

Returns the service request problem code description.

getProblemCodeID
public java.lang.String **getProblemCodeID** ()

Returns the service request problem code id.

getProduct
public long **getProduct** ()

Returns the product id.

getProductDesc
public java.lang.String **getProductDesc** ()

Returns the product description.

getRequestType
public java.lang.String **getRequestType** ()

Returns the service request type.

getRequestTypeID
public long **getRequestTypeID** ()

Returns the service request type id.

getSeverity
public java.lang.String **getSeverity** ()

Returns the service request severity.

getSeverityID
public long **getSeverityID** ()

Returns the service request severity id.

getShortDesc

public java.lang.String **getShortDesc** ()

Returns the service request summary.

getStatus

public java.lang.String **getStatus** ()

Returns the service request status.

getStatusID

public long **getStatusID** ()

Returns the service request status id.

getSystemID

public long **getSystemID** ()

Returns the system id (CSI)

getUrgency

public java.lang.String **getUrgency** ()

Returns the service request urgency.

getUrgencyID

public long **getUrgencyID** ()

Returns the service request urgency id.

setAccountID

public void **setAccountID** (long accountID)

Sets the account number.

Parameters: accountID - the account number.

setAttribute1

public void **setAttribute1** (java.lang.String attr)

setAttribute10
public void **setAttribute10** (java.lang.String attr)

setAttribute11
public void **setAttribute11** (java.lang.String attr)

setAttribute12
public void **setAttribute12** (java.lang.String attr)

setAttribute13
public void **setAttribute13** (java.lang.String attr)

setAttribute14
public void **setAttribute14** (java.lang.String attr)

setAttribute15
public void **setAttribute15** (java.lang.String attr)

setAttribute2
public void **setAttribute2** (java.lang.String attr)

setAttribute3
public void **setAttribute3** (java.lang.String attr)

setAttribute4
public void **setAttribute4** (java.lang.String attr)

setAttribute5
public void **setAttribute5** (java.lang.String attr)

setAttribute6
public void **setAttribute6** (java.lang.String attr)

setAttribute7
public void **setAttribute7** (java.lang.String attr)

setAttribute8

public void **setAttribute8** (java.lang.String attr)

setAttribute9

public void **setAttribute9** (java.lang.String attr)

setCallerType

public void **setCallerType** (java.lang.String callerType)

setContactBy

public void **setContactBy** (java.lang.String contactBy)

Sets the contact method.

Parameters: contactBy - the contact by method.

setContactInfo

public void **setContactInfo** (java.lang.String contactInfo)

setContactName

public void **setContactName** (java.lang.String contactName)

Sets the contact name.

Parameters: contactName - the contact name.

setContactPartyID

public void **setContactPartyID** (long contactPartyID)

Sets the contact party id.

Parameters: contactPartyID - the contact party id.

setContactPointID

public void **setContactPointID** (long contactPointID)

Sets the contact point id.

Parameters: contactPointID - the contact point id.

setCpRevision

public void **setCPRevision** (java.lang.String cpRevision)

setCpRevisionID

public void **setCPRevisionID** (long cpRevisionID)

setCustomerID

public void **setCustomerID** (long customerID)

Sets the customer id.

Parameters: customerID - the customer id.

setDateLogged

public void **setDateLogged** (java.sqlTimestamp dateLogged)

Sets the service request creation date.

Parameters: dateLogged - the service request creation date

setEmployeeID

public void **setEmployeeID** (long employeeID)

Sets the employee id.

Parameters: employeeID - the employee id.

setFileIDList

public void **setFileIDList** (java.lang.String fileIDList)

Set attached file id list.

Parameters: fileIDList - the file id list.

setHelpdeskNO

public void **setHelpdeskNO** (java.lang.String helpdeskNO)

Set my reference number.

Parameters: helpdeskNO - my reference number.

setID

public void **setID** (long id)

Set the service request id.

Parameters: id - the service request id.

setIsCancelledByUser

public void **setISCancelledByUser** (boolean isCancelledByUser)

Set to true if the service request is cancelled by user.

Parameters: true - if the service request is cancelled by user.

setItem

public void **setItem** (long item)

Set the item id.

Parameters: item - the item id.

setItemDesc

public void **setItemDesc** (java.lang.String itemDesc)

Set the item description.

Parameters: itemDesc - the item description.

setItemRevision

public void **setItemRevision** (java.lang.String itemRevision)

Set the item revision.

Parameters: itemRevision - the item revision.

setKbNotUsefullDList

public void **setKbNotUsefulIDLList** (java.lang.String kbNotUsefulIDList)

Set not useful solution id list from knowledge base.

Parameters: not - the solution id list from knowledge base.

setKbUsefullDList

public void **setKBUsefulIDList** (java.lang.String kbUsefulIDlist)

Set useful solution id list from knowledge base.

Parameters: useful - the solution id list from knowledge base.

setLanguage

public void **setLanguage** (java.lang.string language)

Set the language.

Parameters: language - the language.

setLastUpdated

public void **setLastUpdated** (java.sqlTimestamp lastUpdated)

Sets the last update of the service request.

Parameters: lastUpdated - the last update date of the service request.

setLoggedBy

public void **setLoggedBy** (java.sqlTimestamp loggedBy)

Public accessors for setting the user id who logged the service request.

Parameters: loggedBy - who logged the service request.

setLoginID

public void **setLoginID** (long loginID)

setLongDesc

public void **setLongDesc** (java.lang.String longDesc)

Set the service request long description.

Parameters: longDesc - the service request long description.

setNumber

public void **setNumber** (java.lang.String number)

Sets the service request number.

Parameters: number - the service request number

setOSRevision

public void **setOSRevision** (java.lang.String OSVersion)

Set the operating system version.

Parameters: OSVersion - the operating system version.

setOwner

public void **setOwner** (java.lang.String Owner)

Public accessors for setting the owner of the service request.

Parameters: owner - the name of the owner of the service request.

setOwnerID

public void **setOwnerID** (java.lang.String OwnerID)

Public accessors for setting the user id of the owner of the service request.

Parameters: ownerID - the user id of the owner of the service request.

setPartyID

public void **setPartyID** (long partyID)

Set the party id.

Parameters: partyID - the party id.

setPlatform

public void **setPlatform** (java.lang.String platform)

Set the platform.

Parameters: platform - the platform.

setPlatformID

public void **setPlatformID** (long platformID)

Set the platform id.

Parameters: platformID - the platform id.

setProblemCode

public void **setProblemCode** (java.lang.String problemCode)

Set the service request problem code description.

Parameters: problemCode - the service request problem code description.

setProblemCodeID

public void **setProblemCodeID** (java.lang.String problemCodeID)

Set the service request problem code id.

Parameters: problemCodeID - the service request problem code id.

setProduct

public void **setProduct** (long product)

Set the product id.

Parameters: product - the product id.

setProductDesc

public void **setProductDesc** (java.lang.String productDesc)

Set the product description.

Parameters: productDesc - the product description.

setRDBMSRevision

public void **setRDBMSRevision** (java.lang.String DBVersion)

Set the database version.

Parameters: DBVersion - the database version.

setRequestType

public void **setRequestType** (java.lang.String requestType)

Set the service request type.

Parameters: requestType - the service request type.

setRequestTypeID

public void **setRequestTypeID** (long requestTypeID)

Set the service request type id.

Parameters: requestTypeID - the service request type id.

setSeverity

public void **setSeverity** (java.lang.String severity)

Set the service request severity.

Parameters: severity - the service request severity.

setSeverityID

public void **setSeverityID** (long severityID)

Set the service request severity id.

Parameters: severityID - the service request severity id.

setShortDesc

public void **setShortDesc** (java.lang.String shortDesc)

Set the service request summary.

Parameters: shortDesc - the service request summary.

setStatus

public void **setStatus** (java.lang.String status)

Set the service request status.

Parameters: status - the service request status.

setStatusID

public void **setStatusID** (long statusID)

Set the service request status id.

Parameters: statusID - the service request status id.

setSystemID

public void **setSystemID** (long systemID)

Set the system id.

Parameters: systemID- the system id.

setUrgency

public void **setUrgency** (java.lang.String urgency)

Set the service request urgency.

Parameters: urgency - the service request urgency.

setUrgencyID

public void **setUrgencyID** (long urgencyID)

Set the service request urgency id.

Parameters: urgencyID - the service request urgency id.

setUserID

public void **setUserID** (long userID)

Set the user id.

Parameters: userID - the user id.

C.9 Class NoteInfo

The public class NoteInfo extends java.lang.Object. This class is a data object that stores note information that is attached to a service request.

C.9.1 NoteInfo Field Information

The table below is the field information for the public NoteInfo class.

Table C–4 Class NoteInfo Field Information

		Description
public java.sql.Timestamp	lastUpdateDate	Holds the last update date of the service request.
public java.lang.String	note	Holds the note text.
public static final java.lang.String	RCS_ID	
public static final boolean	RCS_ID_RECORDED	
public java.lang.String	status	Holds the note status.
public java.lang.String	type	Holds the note type.
public long	userID	Holds the user ID of the user who updates the note.

C.9.2 NoteInfo Constructor Information

public **NoteInfo** () Default constructor

public **NoteInfo** (java.lang.String note, java.lang.String status, long userID, java.lang.String type, java.sql.Timestamp lastUpdateDate) Constructor

C.9.2.1 Methods Inherited from class java.lang.Object

clone, equals, finalize, getClass, hashCode, notify, notifyAll, toString, wait, wait, wait

C.10 Class ProductInfo

The public class ProductInfo extends java.lang.Object. This class is a data object that stores product information that is attached to a service request.

C.10.1 ProductInfo Field Information

The table below is the field information for the public ProductInfo class.

Table C–5 Class ProductInfo Field Information

public static final java.lang.String	RCS_ID
public static final boolean	RCS_ID_RECORDED

C.10.2 ProductInfo Constructor Information

public **ProductInfo** () Constructor

C.10.2.1 Methods Inherited from class java.lang.Object

clone, equals, finalize, getClass, hashCode, notify, notifyAll, toString, wait, wait, wait

C.10.3 ProductInfo Method Index

The table below is a method index of this class.

	Method	Description
long	getCustomerProductID	Gets the customer product ID.
java.lang.String	getPartNumber	Gets the product part number.
java.lang.String	getProductDesc	Gets the product description.
java.lang.String	getProductName	Gets the product name.
java.lang.String	getSerialNumber	Gets the product serial number.
void	setCustomerProductID	Sets the customer product ID.

	Method	Description
viod	setPartNumber	Sets the product part number.
void	setProductDesc	Sets the product description.
void	setProductName	Sets the product name.
void	setSerialNumber	Sets the product serial number.
void	setUserID	Set the user id.

C.10.4 ProductInfo Method Detail

Following is the method detail for this class.

getCustomerProductID

public long **getCustomerProductID** ()

Gets the customer product ID.

getPartNumber

public java.lang.String **getPartNumber** ()

Gets the product part number.

getProductDesc

public java.lang.String **getProductDesc** ()

Gets the product description.

getProductName

public java.lang.String **getProductName** ()

Gets the product name.

getSerialNumber

public java.lang.String **getSerialNumber** ()

Gets the product serial number.

setCustomerProductID

public void **setCustomerProductID** (long id)

Sets the customer product ID.

Parameters: id - the customer product ID.

setPartNumber

public void **setPartNumber** (java.lang.String partNumber)

Sets the product part number.

Parameters: partNumber - the product part number.

setProductDesc

public void **setProductDesc** (java.lang.String productDesc)

Sets the product description.

Parameters: productDesc - the product description.

setProductName

public void **setProductName** (java.lang.String productName)

Sets the product name.

Parameters: productName - the product name.

setSerialNumber

public void **setSerialNumber** (java.lang.String serialNumber)

Sets the product serial number.

Parameters: serialNumber - the product serial number.

C.11 Class ViewServiceRequest

The public class ViewServiceRequest is an abstract class used to search service requests. It contains code that is common among all different types of searches. Classes extending ViewServiceRequest are required to define the from table and additional joining conditions.

C.11.1 ViewServiceRequest Field Information

The table below is the field information for the public ViewServiceRequest class.

Table C–6 Class ViewServiceRequest Field Information

		Description
protected static java.lang.String	ACCOUNT_ID	
protected static java.lang.String []	COLUMN	Columns that are allowed in the search criteria. This needs to be a 1-to-1 mapping to SRConstant.COLUMN.
protected static java.lang.String []	COLUMN2	Column names in the foreign table that joins with CS_ INCIDENTS_ALL_VL. This needs to be a 1-to-1 mapping to COLUMN.
protected static java.lang.String	CONTRACT_ID	
protected static java.lang.String	CREATION_DATE	CREATION_DATE column.
protected static java.lang.String	CUSTOMER_ID	
protected static java.lang.String	EMPLOYEE_ID	
protected static java.lang.String	HELPDESK_NUM	
protected static java.lang.String	INV_ITEM_ID	
protected static java.lang.String	LAST_UPDATE_DATE	
protected static java.lang.String	PARTY_ID	
protected static java.lang.String	PRODUCT_ID	
protected static java.lang.String	PROJECT_NUM	
static java.lang.String	RCS_ID	
static boolean	RCS_ID_RECORDED	
protected static java.lang.String	SEVERITY_ID	
protected static java.lang.String	SR_ID	INCIDENT_ID column.

Table C–6 Class ViewServiceRequest Field Information

		Description
protected static java.lang.String	SR_NUM	INCIDENT_NUMER column.
protected static java.lang.String	STATUS_ID	
protected static java.lang.String	SUMMARY	
protected static java.lang.String	TYPE_ID	
protected static java.lang.String	UPDATE_DATE	LAST_UPDATE_DATE column
protected static java.lang.String	URGENCY_ID	
protected static java.lang.String []	VIEWS	Name of the foreign tables / views that joins with CS_ INCIDENTS_ALL_VL. This needs to be a 1-to-1 mapping to COLUMN.

C.11.2 ViewServiceRequest Constructor Information

public **ViewServiceRequest** () Constructor

C.11.2.1 Methods Inherited from class java.lang.Object

clone, equals, finalize, getClass, hashCode, notify, notifyAll, toString, wait, wait, wait

C.11.3 ViewServiceRequest Method Index

The table below is a method index of this class.

	Method	Description
protected void	contstructFrom	Constructs the rest of the from clause of the query string.
protected abstract void	constructFromTable	Constructs the from table clause of the query string.
protected void	constructOrderBy	Constructs the order by clause of the query string.
protected void	constructQuery	Constructs the query string.

	Method	Description
protected void	constructSelect	Constructs the select statement of the query string.
protected void	constructWhere	Constructs the where clause of the query string.
protected abstract void	constructWhereExtra	Constructs the extract where clause of the query string.
abstract ServiceRequestInfo []	fetchResults	Deprecated. Use fetchResults2
static ServiceRequestInfo []	fetchResults2	Fetches service request based on view object.
ServiceRequestInfo []	fetchSR	Fetches service request based on the select criteria.
protected abstract boolean	fetchSRPreAction	This method will be invoked by classes extending ViewServiceRequest.
protected void	populate	Populates the service request information object.
protected static void	processFilter	Processes the filter condition.

C.11.4 ViewServiceRequest Method Detail

Following is the method detail for this class.

constructFrom

protected void **constructFrom** (java.lang.StringBuffer buffer, java.lang.String [] select)

Constructs the rest of the from clause of the query string.

Parameters: buffer - the query string buffer; select - the selected columns.

constructFromTable

protected abstract void **constructFromTable** (java.lang.StringBuffer buffer, java.lang.String [] select)

Constructs the from table clause of the query string.

Parameters: buffer - the query string buffer; select - the selected columns.

constructOrderBy

protected void **constructOrderBy** (java.lang.StringBuffer buffer, StringPair [] orderBy)

Constructs the order by clause of the query string.

Parameters: buffer - the query string buffer; orderBy - the order by columns.

constructQuery

protected void **constructQuery** (java.lang.StringBuffer buffer, java.lang.String [] select, java.util.Hashtable filter, StringPair [] orderBy)

Constructs the query string.

Parameters: buffer - the query string buffer; select - the selected columns; filter - the filtering criteria; orderBy - the order by columns.

constructSelect

protected void **constructSelect** (java.lang.StringBuffer buffer, java.lang.String [] select)

Constructs the select statement of the query string.

Parameters: buffer - the query string buffer; select - the selected columns.

constructWhere

protected void **constructWhere** (java.lang.StringBuffer buffer, java.lang.String [] select, java.util.Hashtable filter)

Constructs the where clause of the query string.

Parameters: buffer - the query string buffer; select - the selected columns; filter - the filtering criteria.

constructWhereExtra

protected abstract void **constructWhereExtra** (java.lang.StringBuffer buffer, java.lang.String [] select, java.util.Hashtable filter)

Constructs the extract where clause of the query string. This method is invoked upon entering constructWhere method.

Parameters: buffer - the query string buffer; select - the selected columns; filter - the filtering criteria.

fetchResults2

public static ServiceRequestInfo [] **fetchResults2** (IBUParameters ibuParam, ViewInfo viewInfo, int startPage, int batchSize, int [] totalCount)

Fetches service request based on the view object. If the SRConstant.EMPLOYEE_ID is not set in the filter criteria, it will search for customer service requests. Otherwise, it will assume the caller is an employee and does appropriate logic.

Returns: The array of service request info taht match the criteria and range.

Throws: java.lang.Exception - if error.

Parameters: ibuParam - the standard IBU parameters; viewInfo - the view object; startPage - the start page number, 0-based; batchSize - the number of records per page; totalCount - the total number of records matching the criteria, this is a return parameter.

fetchSR

public ServiceRequestInfo [] **fetchSR** (IBUParameters ibuParam, java.lang.String [] select, java.util.Hashtable filter, StringPair [] orderBy, int startPage, int batchSize, int [] totalCount)

Fetches the service request based on the select criteria.

Returns: True to continue the execution of fetchSR, otherwise false.

Throws: java.lang.Exception - if error.

Parameters: ibuParam - the standard IBU parameters; select - the selected columns; filter - the filtering criteria; orderBy - the order by columns; startPage - the start page number, 0-based; batchSize - the number of records per page; totalCount - the total number of records matching the criteria, this is a return parameter.

fetchSRPreAction

protected abstract boolean **fetchSRPreAction** (IBUParameters ibuParam, java.lang.String [] select, java.util.Hashtable filter, StringPair [] orderBy, int startPage, int batchSize, int [] totalCount)

This method will be invoked by classes extending ViewServiceRequest. It is invoked upon entering fetchSR method. If this method returns false, fetchSR will exit.

Returns: True to continue the execution of fetchSR, otherwise false.

Parameters: ibuParam - the standard IBU parameters; select - the selected columns; filter - the filtering criteria; orderBy - the order by columns; startPage - the start

page number, 0-based; batchSize - the number of records per page; totalCount - the total number of records matching the criteria, this is a return parameter.

populate

protected final void populate (ServiceRequestInfo si, java.lang.string [] select, java.sql.ResultSet set, ServiceRequestUtil util, IBUParameters ibuParam)

Populates the service request information object.

Throws: java.lang.Exception if error.

Parameters: si - the service request info object; select - the selected columns; set - the result set; util - the service request util instance; ibuParam - the standard IBU parameters.

processFilter

protected static void processFilter (java.util.Hashtable filter)

Processes the filter condition. Converts those attributes that are in CSV format into a String query.

Parameters: filter - the filter criteria.

Glossary

account

Account refers to the details or attributes of a deploying company's selling relationship with a party. A selling relationship can include orders or negotiated prices. Account attributes do not describe a party; they only exist when a selling relationship is present between the deploying company and the party.

account number

Number designated in the Trading Community Architecture (TCA) or Accounts Receivable (AR) and used to group account information about a party.

account site

A party site that is used within the context of an account, e.g., for shipping or billing purposes.

business entity

A branch, subsidiary, division, etc. of a company.

company

The entire business, including all business entities in the organizational structure.

contact point

A means of contacting a party other than sending physical mail, e.g., a phone number, e-mail address, telex number, fax number, etc.

customer

A person or organization with whom the deploying company has a selling relationship, regardless of whether anything has actually been purchased or

serviced. A selling relationship may be established by actually selling products, or it may be established by simply negotiating terms that will be used if you later sell products. In both scenarios, a *selling relationship* exists.

deploying company

The Oracle customer that has, or will, install, implement, and run all or part of the Oracle E-Business suite.

DUNS Number

A unique identifier used by Dun & Bradstreet, a major business data content provider. The DUNS number is an attribute in the TCA.

GUI

An acronym for Graphical User Interface.

instance, item instance

In Oracle Install Base, an instance is an occurence of an item entity. For example, a manufacturer has a part number for a television he makes; each time he sells one television, an occurrence of this part number is recorded in Install Base

location

A point in geographical space described by a street address.

merchant

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

multiple organizations (multi org)

The ability to define multiple organizations and the relationships among them within a single installation of Oracle Applications. These organizations can be sets of books, business groups, legal entities, operating units, or inventory organizations.

party

An entity in the TCA that can enter into business relationships. A party is a real person, an organization, a branch, a subsidiary, a legal entity, a holding company, etc. In TCA, the attributes of a party are considered universal, i.e., they are independent of your selling or buying relationship with the party.

party relationship

In TCA, a binary relationship between two parties, such as a partnership. A party relationship can be a party itself, meaning certain party relationships can enter into relationship themselves.

party site

In TCA, the link between a party and a location that indicates the location is valid for that party. A party site is not intended to represent a distinct business entity with which you can do business.

registration

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

Registration Admin UI

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

Registration Self-Service User UI

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

registration template

Part of the Oracle CRM JTF User Management Framework (JUMF), registration templates are JSP pages set up by the application administrator to capture accommodate user information-gathering requirements.

responsibilities

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

roles

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

self-service registration

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

system administrator

Also called sysadmin, the system administrator is a user who performs the highest-level administrator tasks in Oracle applications.

TCA

An acronym for Trading Community Architecture, sometimes used interchangeably with the Oracle Trading Community Model.

Trading Community Model

The Oracle Trading Community Model, also known as Trading Community Architecture (TCA).

UI

An acronym for User Interface.

user

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

user types

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

user type, business

A user with a selling relationship to the deploying company.

user type, employee

A user who is an employee of the deploying company.

user type, individual

A user with no selling relationship to the deploying company.

user type, primary

A designated person of a party, business entity, or internal group (for example, sales department) who is responsible for approving other users and resetting passwords.

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