Oracle® *i*Support

Concepts and Procedures

Release 11*i*

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This users' guide details the administration, maintenance, and usage of Oracle *i*Support, Release 11*i* (11.5.6).

Oracle *i*Support Concepts and Procedures Release 11*i*

Part No. A95862-01

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Oracle *i*Support Concepts and Procedures, Release 11*i*

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Preface

Welcome to Release 11*i* of the *Oracle iSupport Concepts and Procedures*. This guide is intended to be utilized in the understanding, administration, and usage 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 understand, administer, and use Oracle *i*Support and Oracle Knowledge Management, release 11.5.6. It is organized into the following chapters:

- Chapter 1 -- *Understanding Oracle iSupport* -- Contains conceptual details designed to aid in understanding the application and its various components.

- Chapter 2 -- *Administering Oracle iSupport* -- provides Oracle *i*Support administrative (including primary users) users with task-based procedures for maintaining the application.
- Chapter 3 -- *Using Oracle iSupport* -- provides task-based procedures for using the application effectively. It is geared toward general users of the application, including the following: business users, individual users, and employee users.
- Chapter 4 -- *Understanding Knowledge Management* -- provides conceptual information about the KM module, and in general is meant to help KM administrative users gain a greater understanding of the module.
- Chapter 5 -- *Using Knowledge Management* -- provides the step-by-step instructions for KM tasks required for setup and maintenance of the KM module by administrative users. This chapter also provides limited end user / general user task information.

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

Understanding Oracle *i*Support

This topic group provides an overview of Oracle *i*Support and its components, introductory explanations of dependencies, and discussion of key concepts of major features.

Task-based administrator procedures necessary for ongoing application maintenance can be found in the **Administering Oracle *i*Support** topic group (online help) or chapter (PDF version) of the *Oracle iSupport Concepts and Proceduress*.

For user/customer-facing procedures, see the **Using Oracle *i*Support** topic group (online help) or chapter (PDF version) of the *Oracle iSupport Concepts and Procedures.* (Generally, the PDF version of the documentation will always be more current than the online help version.)

For setup information regarding the application, please see the *Oracle iSupport Implementation Guide*. The implementation guide is released in both in HTML and PDF, with the most recent PDF version at Oracle MetaLink (http://metalink.oracle.com) and the most recent HTML version on the Oracle Applications CD-ROM. Please visit the Oracle Documentation Center (http://docs.oracle.com) to order printed copies of the guides.

Topics in this section include:

- Main Components of Oracle iSupport
- Oracle iSupport Documentation List
- Oracle iSupport Dependencies and Integration Points
- Understanding User Management
- Understanding the iSupport Homepage
- Understanding Service Request in iSupport

- Understanding Account Management in iSupport
- Understanding Forums in iSupport
- Understanding Knowledge Management in iSupport

1.1 Main Components of Oracle *i*Support

The main components of Oracle *i*Support are:

- **Service Request -** This module enables users to submit and manage their service requests online. Service requests can be bookmarked by users for display on the Homepage, plus the user can create and bookmark saved searches of submitted requests. Merchants using Service Request can offer or enforce knowledge base solutions as well as enforce product association during service request creation. Merchants can also setup and utilize customized templates which gather relevant service request information during service request creation.
- **Knowledge Management -** A comprehensive solution management system which enables companies to create, store, and score known technical problem solutions.
- **Products -** Users have the ability to view their Install Base data as well as add products to it through the Products tab.
- **Forums -** Interactive forums allow customers to search for information, post questions, and share technical knowledge with other users.
- **Account Management -** The Account Management feature gives users online, 24-hour access to their invoices, payments, shipment information, returns, and service contracts. The Returns functionality allows users to create Return Material Authorizations (RMAs) online.
- **Homepage -** Users can personalize the homepage with links to frequently-used data, such as service request activity and knowledge base search results. Merchants can display Alerts, Company News, and other important information on the homepage.
- **Customer Communications -** The Call Me feature allows users to submit call-back requests via the web at any time. The Surveys feature allows merchants to provide questionnaires to their users in order to gather relevant customer feedback.

1.2 Oracle *i*Support Documentation List

Below is a list of Oracle *i*Support documentation (organized by functional module) as of Fall/Winter 2001-2002.

The most recent Oracle *i*Support guides can be found at Oracle MetaLink (http://metalink.oracle.com). CD-released versions of the guides can be found at the Oracle Documentation Center (http://docs.oracle.com).

1.2.0.1 User Management in Oracle *i*Support

- **User Setup**

  Oracle iSupport Implementation Guide: Setting up iSupport Users in the *Implementation Tasks* chapter.

- **User Administration**

  Oracle iSupport Concepts and Procedures and online help: Administering Oracle iSupport: Maintaining Users.

- **User Concepts**

  Oracle iSupport Concepts and Procedures and online help: Understanding Oracle *i*Support: Understanding User Management.

1.2.0.2 Service Request in Oracle *i*Support

- **Service Request Setup**

  Oracle iSupport Implementation Guide: *Integrating Oracle iSupport with Service Request* chapter.

- **Service Request Administration**

  Oracle iSupport Concepts and Procedures and online help: Administering Oracle iSupport: Maintaining Service Request Functions.

- **Service Request Concepts**

  Oracle iSupport Concepts and Procedures and online help: Understanding Oracle *i*Support: Understanding Service Request in Oracle *i*Support.

- **Service Request User/Customer-Facing Help**

  Oracle iSupport Concepts and Procedures and online help: Using Oracle *i*Support: Using Service Request.

1.2.0.3 Products in Oracle *i*Support

- **Products Setup**

  Oracle iSupport Implementation Guide: *Integrating Oracle iSupport with Products and Returns* chapter.

- **Products User/Customer-Facing Help**

  Oracle iSupport Concepts and Procedures and online help: Using Oracle *i*Support: Using Oracle Install Base.

1.2.0.4 Forums in Oracle *i*Support

- **Forums Setup**

  Oracle iSupport Implementation Guide: Setting up Forums topic in the *Implementation Tasks* chapter.

- **Forums Administration**

  Oracle iSupport Concepts and Procedures and online help: Administering Oracle *i*Support: Managing Forums.

- **Forums User/Customer-Facing Help**

  Oracle iSupport Concepts and Procedures and online help: Using Oracle *i*Support: Using Forums.

1.2.0.5 Account Management in Oracle *i*Support

- **Account Management Setup**

  Oracle iSupport Implementation Guide.

- **Account Management User/Customer-Facing Help**

  Oracle iSupport Concepts and Procedures and online help: Using Oracle *i*Support: Using Accounts and Using Returns.

1.2.0.6 Homepage in Oracle *i*Support

- **Homepage Setup**

  Oracle iSupport Implementation Guide: Setting up Homepage topic in the *Implementation Tasks* chapter.

- **Homepage Administration**

Oracle iSupport Concepts and Procedures and online help: Administering Oracle *i*Support: Maintaining the Homepage.

- **Homepage Concepts**

  Oracle iSupport Concepts and Procedures and online help: Understanding Oracle *i*Support: Understanding the *i*Support Homepage.

- **Homepage User/Customer-Facing Help**

  Oracle iSupport Concepts and Procedures and online help: Using Oracle *i*Support: Using the Homepage.

1.2.0.7 Surveys in iSupport

- **Surveys Setup**

  Oracle iSupport Implementation Guide: Setting up Surveys topic in the *Implementation Tasks* chapter.

- **Surveys User/Customer-Facing Help**

  Oracle iSupport Concepts and Procedures and online help: Using Oracle *i*Support: Responding to Surveys topic.

1.2.0.8 Web Call-Back (Call Me) in iSupport

- **Call-Back Setup**

  Oracle iSupport Implementation Guide: Setting up Web Call-Back topic in the *Implementation Tasks* chapter.

- **Call-Back User/Customer-Facing Help**

  Oracle iSupport Concepts and Procedures and online help: Using Oracle *i*Support: Requesting a Support Call-back topic.

1.2.0.9 Knowledge Management in Oracle *i*Support

- **Knowledge Management Setup**

  Oracle iSupport Implementation Guide: *Integrating Oracle iSupport with Oracle Knowledge Management*.

- **Knowledge Management Administration**

  Oracle iSupport Concepts and Procedures and online help: Using Knowledge Management.

- **Knowledge Management Concepts**

  Oracle iSupport Concepts and Procedures and online help: Understanding Knowledge Management.

- **Knowledge Management User/Customer-Facing Help**

  Oracle iSupport Concepts and Procedures and online help: Using Knowledge Management.

1.3 Oracle *i*Support Dependencies and Integration Points

Oracle *i*Support is dependent upon and integrates with many other Oracle applications to provide data and extend its functionality. A brief list of these dependencies and integration points is shown below.

For more detailed information on setup dependencies, integration points, and implementation information, please refer to the *Oracle iSupport Implementation Guide*.

- **Oracle AOL -** 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 linkage of users to responsibilities.
- **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.
- **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, *Integrating Oracle iSupport with Oracle Workflow*, in the *Oracle iSupport Implementation Guide*.
- **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.

- **Oracle 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.
- **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.
- **Oracle HRMS -** Oracle Human Resources Management System (HRMS) provides employee data for CRM and ERP applications (provided you are not using a third-party application).
- **Oracle CRM Foundation -** CRM Foundation 11*i* supplies much of the data and functionality for Oracle *i*Support. You must set up Foundation in order to utilize Oracle *i*Support. For more information, see the *Oracle iSupport Implementation Guide*.
- **Oracle Install Base and Oracle Inventory -** 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.
- **Oracle Support -** Oracle Support (also called TeleService) contains the Service Request functionality that allows customers to submit, view, edit, and manage their service requests online.
- **Oracle Contracts Suite -** Oracle Contracts Suite provides information on service contracts and warranties. You will need to do a full installation of Contracts Suite in order to utilize this functionality. The Contracts Suite is comprised of Contracts Core and Contracts for Service.
- **Oracle Order Management (OM) -** An Oracle ERP application, OM provides returns functionality within Oracle *i*Support. You must set up OM for Returns functionality.
- **Order Capture (OC) APIs -** Order Capture APIs provide Returns functionality in Oracle *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 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 Call Back topic in the *Implementation Tasks* chapter.

- **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.

1.4 Understanding User Management

Oracle *i*Support leverages the Oracle CRM Technology Foundation User Management Framework (JTT user management framework) for providing user registration/enrollments, user approvals, and user management functionality. The JTT user management framework allows administrators to add application-specific user types and enrollments based on unique business requirements.

Most user management tasks are carried out on the System Administrator Console, a web-based interface that allows you to use the components of the CRM Technology Foundation, including:

- run diagnostics
- design page flows
- customize UI components
- manage security
- manage users

Note: The information in this section is meant to give you an overview of the JTT user management framework concepts. More specific and comprehensive information can be found in the *Oracle CRM Technology Foundation Concepts and Procedures: Understanding User Management*.

The JTT user management framework has four main components:

1. User Types
2. Enrollments/Subscription Services

3. Templates
4. Approval Process

1.4.1 User Types

Users are classified into user types for registration purposes. User types are defined to meet the specific needs of an application; they reflect a broad category of users. User types allow flexible, extendible ways to define, categorize, and implement the behavior of users. User types are tied to enrollments (subscription services), default responsibilities, and default roles.

The following sections discuss user types that pertain to Oracle *i*Support, including:

- Primary User (Organization Contact)
- Business User (B2B)
- Individual User (B2C)

Please see Other Users for a discussion of Oracle *i*Support users who do not follow the predefined JTT user types.

1.4.1.1 Primary User (Organization Contact)

Seeded as a User Type in the JTT user management framework, this user is also known as the customer administrator. This 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

JTT user management framework will support any number of Primary Users.

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.

1.4.1.2 Business User (B2B)

Seeded as a User Type in the JTT user management framework, this user is a typical business-to-business user, associated to an organization other than the merchant utilizing Oracle *i*Support.

1.4.1.3 Individual User (B2C)

Seeded as a User Type in the JTT user management framework, this user type is an individual person with no relationship to an organization. Individual Users will generally be self-registering over the Internet. They are approved automatically by the application (unless this setting is changed by the administrator in the framework) and assigned the default role and responsibility that the administrator specifies for this User Type during application setup configuration.

1.4.2 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 corresponds to one (or zero) responsibility; one (or zero) template (see Templates); one (or zero) workflow; and zero or more roles.

The merchant implementing Oracle *i*Support determines during implementation which enrollments will be explicit and which will be implicit to the user. For more information, see the *Oracle CRM Technology Foundation Concepts and Procedures*.

Sample Registration/Enrollments Scenario for a Business User

User A accesses the HTML login screen and begins self-registration. The first registration screen he sees is a list of user types (such as Primary User, Business User, Individual User). User A selects Business User as his user type. The user type selection determines which implicit enrollments (default role and responsibility tied to his user type) he will get from the JTT user management framework.

During implementation or setup, the application administrator (sysadmin) must configure User Types and implicit enrollments on the System Administrator Console. The administrator may also set up enrollments that users can subscribe to. See the *Oracle CRM Technology Foundation Concepts and Procedures* for more information on enrollments.

Continuing with registration, User A enters his Company ID (provided by his application administrator) and his name, address information, etc. He chooses a unique username and password.

In the next screen, User A is presented with a list of enrollments (such as Self-Service Support Over the Web (for Oracle *i*Support) and Oracle *i*Store). These are explicit enrollments. He can select none, one, or all listed enrollments. If User A select selects no enrollments, he will receive only the implicit enrollments (the default role and responsibility) tied to the Business User Type. Other roles and responsibilities can be manually added later to his username by the Oracle *i*Support Administrator. The sysadmin, utilizing the System Administrator Console, could also later alter the Business User Type, and / or add other roles and responsibilities to the user.

User A then enters the approval process. The JTT user management framework comes with seeded approval processes that leverage Oracle Workflow for e-mail notifications. If User A logs in to the application before he is approved, he will see a screen which tells him that his approval is pending.

Once User A is approved, he will receive an e-mail notifying him of his approval, and he will then be able to log in to the HTML login page. His application landing page will depend upon the default responsibility assigned to him when he logs in.

For more information, see the *CRM Technology Foundation Concepts and Procedures*.

1.4.2.1 Understanding Responsibilities

Oracle Application Foundation Responsibilities define application privileges. They control menu hierarchy available to a particular user type. During the registration process, users are granted access to one or more responsibilities, depending upon the services / enrollments they subscribe to and the merchant policy. Typically, individual consumers are given access only to one responsibility. This is to avoid introducing complexities and unfamiliar concepts. With one responsibility, users don't need to know about the existence of responsibilities. In the case of a registration approval process being set by the merchant, the merchant can designate a temporary (guest) responsibility that gives users limited access until they are approved. The approval process will grant those users access to other responsibilities with appropriate options.

Responsibilities originally contained some security elements at the function level; those turned out not to be sufficient for the CRM HTML applications and now these security elements are included as roles / permissions infrastructure.

For more information, see the *CRM Technology Foundation Concepts and Procedures*.

1.4.2.2 Understanding Roles

A role is a collection of page- and function-level permissions. A permission is the smallest unit making up a role, and one or more permissions make up each role. Permissions dictate exactly which actions the user can perform. Users registering will be assigned default role(s) based on user type. Other roles are assigned when users select explicit enrollments. Additional roles can be assigned according to business needs.

For more information, see the *CRM Technology Foundation Concepts and Procedures*.

1.4.2.3 Self-Service Support Over the Web Enrollment

The JTT user management framework enrollment tied to Oracle *i*Support is called the Self-Service Support Over the Web Enrollment. It is seeded within the JTT 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 1–1 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 1–2 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

1.4.2.4 Modifying Seeded Enrollments

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

1.4.3 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

1.4.3.1 Defining New Registration Templates

New registration templates can be created using the System Administrator Console. Consult the *CRM Technology Foundation Concepts and Procedures* for details.

1.4.4 Approval Process

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.

1.4.4.1 Who Can Be a JTT Approver?

JTT Foundation approvers are application users who have one of the following permissions:

- JTF_REG_APPROVAL or JTF_SECURITY_ASSIGN_ROLE (System Administrator) permission.
- JTF_APPROVER (Request Owner) permission
- JTF_PRIMARY_USER_SUMMARY (Primary user) permission

The Primary User must also have the JTF_PRIMARY_USER responsibility to access the approval page.

Oracle *i*Support user approvers are the Oracle *i*Support Administrator and/or the Primary User(s). See the *Seed Data* appendix for their appropriate roles and permissions.

1.4.4.2 Defining a New Approval Process

New approval processes can be defined on the System Administrator Console. Consult the *CRM Technology Foundation Concepts and Procedures* for details.

1.4.5 Other Users

In addition to the seeded JTF User Types (Primary, Business, Individual), the merchant implementing Oracle *i*Support will receive a system administrator login/password and will create a user called the Oracle *i*Support Administrator. In addition, he can choose to set up employee users, Oracle Knowledge Management administrator-users, and/or survey administrators. These users are discussed below.

- Oracle Applications System Administrator
- Oracle iSupport Administrator
- Employee User
- Knowledge Management (KM) Admin User
- Survey Administrator

1.4.5.1 Oracle Applications System Administrator

The System Administrator (SA) role is common to all Oracle Applications and comes seeded with the applications. This is the highest-level user. This user comes with a sysadmin login and password (sysadmin/sysadmin). It is recommended that you change the password for this user at earliest convenience. For more information, see:

- *Oracle Applications System Administrator's Guide*
- *Oracle Applications Implementation Guide*
- *Oracle Applications Concepts*
- *CRM Technology Foundation Concepts and Procedures*

1.4.5.2 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. The Oracle *i*Support Administrator is a user chosen by the merchant to perform routine but high-level administrative tasks, such as:

- Setting up users and assigning appropriate roles and responsibilities
- Setting up the application Homepage
- Setting up Service Request (Oracle Support/TeleService)
- Setting up Products tab/Install Base
- Setting up Knowledge Management
- Setting up Accounts Management functionality
- Setting up Forums
- Setting up Web Call-Back features
- Setting up Surveys

Instructions for setting up this user can be found in the *Oracle iSupport Implementation Guide*.

1.4.5.3 Employee User

The Employee User is not seeded as a User Type in the JTT user management framework 11.5.6 release, but is supported for this release (11.5.6) of Oracle *i*Support. This type of user is an employee of the merchant using Oracle *i*Support. This user is set up through the Forms interface by the Oracle *i*Support

Administrator. For information on setting up this type of user, see the Setting up iSupport Users topic in the *Implementation Tasks* chapter of the *Oracle iSupport Implementation Guide* (11.5.6).

1.4.5.4 Knowledge Management (KM) Administrator-User

This is a user who performs Knowledge Management 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 the Knowledge Management functionality. For more information, see the *Integrating Oracle iSupport with Oracle Knowledge Management* chapter of the *Oracle iSupport Implementation Guide* (11.5.6).

1.4.5.5 Survey Administrator

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 Configuring Surveys topic of this guide.

1.5 Understanding the *i*Support Homepage

The Homepage is the landing page for all users who log in to Oracle *i*Support.

Using the Homepage, the merchant can supply alerts, system information and links to support areas of the application. He can select some content to be required to display on the Homepage. This content is known as Mandatory Content.

Oracle *i*Support users can customize the Homepage to store service request filtered views, quick links to service request activity, and knowledge base searches. Content is stored in content areas called bins, some of which editable by the users.

This section describes administrative concepts regarding the Homepage. For administrative steps about maintaining the Homepage, see the Maintaining the Homepage topic in the Administering Oracle iSupport section. For general using information, see the Using the Homepage topic in the Using Oracle iSupport section.

Topics in this group include:

- Understanding the Content Administration Screen
- Homepage Seeded Content
- Homepage Non-Seeded Content

Related topic:

- Maintaining the Homepage

1.5.1 Understanding the Content Administration Screen

The Content Administration Screen is the first screen that displays when you select the Homepage tab as administrator. This screen, which summarizes content being displayed on the homepage, also allows access to modify content. The content of the screen is discussed below. For administrator tasks associated with the homepage, please see the Maintaining the Homepage in the Administering Oracle *i*Support section of this guide. For homepage implementation tasks, see the *Oracle iSupport Implementation Guide*.

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

Content Name - This is the name of the content being displayed.

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

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

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

From MES - The From MES column indicates whether or not the information is from the Marketing Encyclopedia System.

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

1.5.2 Homepage Seeded Content

Seeded content is content that comes out-of-the-box with the application. Seeded homepage content includes:

Service Request - Bin containing filtered service request activity, set up by the user.

Service Request Quick Links - Bin containing service request links that have been bookmarked by the user.

Quick Links - Bin containing knowledge base solutions that have been bookmarked by the user.

How Can We Help You? - Bin containing the following links:

- *Find a Solution* - This is a link to the Knowledge Management landing page.
- *Frequently Used Solutions* - This is a link to the Common Problems page where users can also access the Marketing Encyclopedia System (MES), also known as the Technical Library.
- *Create a Service Request* - Links to the Service Request creation page.

Related topic:

- Maintaining the Homepage

1.5.3 Homepage Non-Seeded Content

Non-seeded content is content that the administrator defines on the homepage. Some non-seeded content becomes available through Marketing Encyclopedia System, for example, Alerts and Company News bins.

Oracle *i*Support does not currently support adding content through Java objects and PL/SQL statements.

Directions for setting up MES content are available *Oracle Marketing Encyclopedia Implementation Guide*.

Related topic:

- Maintaining the Homepage

1.6 Understanding Service Request in *i*Support

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

- 24-hour web-based service request management
- Customizable templates for gathering support information
- Enforceable knowledge base search during request creation
- Enforceable product selection during request creation
- Ability by customer to re-open a closed request
- Ability by customer to update an existing request

1.6.1 Service Request Dependencies

This topic area discusses the Oracle *i*Support service request dependencies.

1.6.1.1 Oracle Support

Oracle Support, also known as Oracle TeleService, provides the bulk of Service Request functionality in Oracle *i*Support. The service request application 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. For more information, see:

- *Oracle Support Implementation Guide*

1.6.1.2 Oracle CRM Application Foundation

Service request processes also are highly dependent upon these CRM Application Foundation modules:

- **Assignment Manager (Assignment Engine) -** 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 -** Service request processes use notes to capture data during creation and update. Administrators must set up note types and map them to iSupport.
- **Resource Manager -** Allows you to set up resources to determine the owners of service requests.
- **Territory Manager -** Allows you to define rules in Assignment Manager.
- The CRM Foundation modules Tasks, Calendar, Interaction History, and Fulfillment also provide functionality.

For more information, see:

- *CRM Application Foundation Implementation Guide*

1.6.1.3 Oracle Workflow

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 the following guides:

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

1.6.2 Understanding 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 must answer them mandatorily.
- Administrator-defined free-form and choice-type answers that relate to the questions posed on the template.
- Weighting of 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 (not activated in this release (11.5.6)).

Templates are presented to the customer/user during request creation as questions and either free-form or choice-type responses.

The information gathered from the templates assists in:

- Routing the service request to the appropriate support agent(s)/group in TeleService.
- Determining the severity of the service request in Oracle Support.

Related topic:

- Service Request Templates

1.7 Understanding Account Management in *i*Support

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*.

1.8 Understanding Forums in iSupport

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 the *Implementation Tasks* chapter of the *Oracle iSupport Implementation Guide*.

1.9 Understanding Knowledge Management in *i*Support

See the Understanding Oracle Knowledge Management chapter or topic group. Oracle Knowledge Management documentation has been bundled with the Oracle *i*Support documentation for the 11.5.6 release.

2

Administering Oracle *i*Support

This topic group provides task-based administrative procedures that are necessary for ongoing Oracle *i*Support maintenance for Release 11*i* (11.5.6).

For conceptual information regarding the application, please see the **Understanding Oracle *i*Support** topic group (online help) and chapter (PDF version) of the *Oracle iSupport Concepts and Procedures*.

For general user/customer-facing procedures, please see the **Using Oracle *i*Support** topic group (online help) or chapter (PDF version) of the *Oracle iSupport Concepts and Procedures*. (Generally, the PDF version of the documentation will always be the most current.)

For setup information regarding the application, please see the *Oracle iSupport Implementation Guide*. The implementation guide is released in both in HTML and PDF, with the most recent PDF version at Oracle MetaLink (http://metalink.oracle.com) and the most recent HTML version on the Oracle Applications CD-ROM. Please visit the Oracle Documentation Center (http://docs.oracle.com) to order printed copies of the guides.

Topics in this section include:

- Maintaining Users
- Changing User Profile Information
- Maintaining the Homepage
- Maintaining Service Request
- Configuring Surveys
- Configuring Call Back (Call Me)
- Administering Forums

2.1 Maintaining Users

For current information on user implementation, user roles, user responsibilities, and seeded user types, please see the *Oracle iSupport Implementation Guide* (11.5.6), the *Oracle Technology Foundation Implementation Guide*, and the *Oracle Technology Foundation Concepts and Procedures*.

This topic group includes:

- Creating Users
- Deleting Users
- Setting Effective Dates for Users
- Searching for Users

Related topics:

- Understanding User Management
- Changing User Profile Information

2.1.1 Creating Users

For directions on how to set up users, please see the current setup information in the *Oracle iSupport Implementation Guide*.

2.1.2 Deleting Users

Use the steps below to delete users from the application.

Steps

1. Log into the JTF login page as Oracle *i*Support Administrator or Primary User.
2. Navigate to **Administration** > **Users**.
3. Find the user whom you wish to delete. See Searching for Users for information on finding users.
4. Select the underlined hyperlink of the appropriate username. The Personal Profile page displays.
5. In the Personal Profile page, enter an **end date** for the user. The username associated with the user will expire on the date you enter.
6. Select **Update**. The application returns a confirmation message.

2.1.3 Setting Effective Dates for Users

Use the steps below to change the effective dates for users of the application.

Steps

1. Log into the JTF login page as Oracle *i*Support Administrator or Primary User.
2. Navigate to **Administration** > **Users**.
3. Find the user whose information you wish to change. See Searching for Users for information on finding users.
4. Select the underlined hyperlink of the appropriate username. The Personal Profile page displays.
5. In the Personal Profile page, enter a **start date** or **end date** for the user. The username associated with the user will be activated on the start date that you enter. The username associated with the user will expire on the end date you enter.
6. Select **Update**. The application returns a confirmation message.

2.1.4 Searching for Users

The user search function allows you to search for users by First Name, Last Name, or Username. Use the following procedure to search for users.

Steps

1. Login to the JTF login as Oracle *i*Support Administrator or Primary User.
2. Navigate to **Administration** > **User**.
3. In the Find User drop-down list, select username, last name or first name.
4. In the textbox, enter your search string. Use the percent sign (%) as a wildcard(s). You can use as many wildcards as you like, but you must enter at least three characters. See examples below.

   Note: To find all users, use three percent signs in row (%%%) as the search string.
5. Select **Go**.
6. The application returns a list of users based on your search criteria.

   Example 1:

Search for all users whose username begins with B:

a. Select Username from the drop-down list.

b. Enter in the textbox: B%%.

c. Select Go.

Example 2:

Search for all users whose last name contains an X:

a. Select Last Name from the drop-down list.

b. Enter in the textbox: %X%.

c. Select Go.

Example 3:

Search for all users whose first name ends in ON:

a. Select First Name from the drop-down list.

b. Enter in the textbox: %ON.

c. Select Go.

2.2 Changing User Profile Information

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

- Changing/Resetting Password
- Adding/Changing Contact Points (Phone/Email/Fax)
- Adding/Changing Address Information
- Setting General Preferences
- Changing Default Responsibility
- Changing Default Customer Account
- Setting up Homepage E-mail Subscription
- Setting User Signature for Forums
- Adding/Changing Company Information
- Viewing Administrator Information

2.2.1 Changing/Resetting Password

Follow the steps below to change or reset a password.

Note: These steps are for administrative users of the application. For general user steps, see the Changing/Resetting Password topic in the Using Oracle iSupport topic group.

Steps

1. Log into the JTF login page as Oracle *i*Support Administrator or Primary User.
2. Navigate to **Administration** > **Users**.
3. Find the user whose information you wish to change. See Searching for Users for information on finding users.
4. Select the underlined hyperlink of the appropriate username. The Personal Profile page displays.
5. In the Personal Profile page, enter the new password in the New Password and Re-enter New Password fields.
6. Click **Update**. The application returns a confirmation message.

2.2.2 Adding/Changing Contact Points (Phone/E-mail/Fax)

Add to or change contact points (such as phone, e-mail, fax) by following the steps below.

Note: These steps are for administrative users of the application. For general user steps, see the Adding/Changing Contact Points topic in the Using Oracle iSupport topic group.

Steps

1. Log into the JTF login page as Oracle *i*Support Administrator or Primary User.
2. Navigate to **Administration** > **Users**.
3. Find the user whose information you wish to change. See Searching for Users for information on finding users.
4. Select the underlined hyperlink of the appropriate username. The Personal Profile page displays.
5. Under the User Profile area, select **Contact Points**. The Contact Points of User page displays.

6. To edit an existing contact point, select the underlined hyperlink of the appropriate contact point.
7. To create a new contact point, select **Create**.
8. You can make additions/alterations to the following:
   - **Communication Type -** Select the method of communication; examples are email, phone, fax.
   - **Phone Line Type -** Select from the drop-down list the type of phone line, if appropriate. Examples are office, home, mobile.
   - **Phone Country Code -** Select the appropriate country code from the list.
   - **Phone Area Code -** Enter phone area code.
   - **Phone Number -** Enter the phone number, without the area code.
   - **Primary Contact** checkbox **-** If this is to be the preferred method of contact, activate this box.

   Note: There can be a primary contact point for each communication type, e.g., there can be a primary e-mail address and a primary phone number.

9. When finished making changes, select **Save**. The application returns a confirmation message.

2.2.3 Adding/Changing Address Information

Address information for users can be changed by either the users themselves or the administrator users (ibu admin or primary user).

Note: The steps below are for administrator users. For general user steps, see the Adding/Changing Address Information topic in the Using Oracle iSupport topic group.

To change company information for a group of users, see Adding/Changing Company Information.

Steps

1. Log into the JTF login page as Oracle *i*Support Administrator or Primary User.

2. Navigate to **Administration** > **Users**.
3. Find the user whose information you wish to change. See Searching for Users for information on finding users.
4. Select the underlined hyperlink of the appropriate username. The Personal Profile page displays.
5. Under the User Profile area, select **Addresses**.
6. To edit an existing address, select the hyperlink of the appropriate address. To create a new address, select **Create**.
7. Make desired changes to the following:
   - **Address Type -** Select the type of address, such as Bill to, Ship to, etc.
   - **Address 1 -** This is the first line of the address that would appear on an envelope or mailing label. You can use this line for primary address information, such as street address, post office box, or apartment number.
   - **Address 2 -** This is the second line of the address that would appear on an envelope or mailing label. You can use this line for secondary or non-critical information, such as a building name or number.
   - **City -** This is the city that relates to the Address field.
   - **State -** This is the state that relates to the Address field.
   - **Postal Code -** This is the postal code or zipcode that relates to the Address field.
   - **Country -** This is the country that relates to the Address field.
   - **Primary Address** checkbox **-** Select this box if this is the preferred address to use for this user.

   Note: There can be a primary address for each address type, e.g., there can be a primary bill to and a primary ship to address.

   ---

8. Select **Save**. The application returns a confirmation message.

2.2.4 Setting General Preferences

Follow the steps below to change general user preferences for the application, such as default language, currency, and date formats.

Note: The steps below are for administrator users. For general user steps, see the Setting General Preferences topic in the Using Oracle iSupport topic group.

Steps

1. Login to the JTF login as Oracle *i*Support Administrator or Primary User.
2. Navigate to **Administration** > **User**.
3. Search for the user whose information you wish to alter. See Searching for Users for directions.
4. Select the underlined hyperlink of the appropriate username. The Personal Profile page displays.
5. Navigate to **Preferences**. The General Preferences page displays.
6. In the General Display area, set the following as desired:
   - **Display Style -** Select a default style sheet.
   - **Language -** Select a default language.
   - **User Currency -** Select a default currency.
   - **Date Format -** Select a date format to use when entering dates.
7. In the Table Display area, set the following as desired:
   - **Display Rows per Page -** Select the number of rows to display of any tables that are used by the application.
   - **Display Blank Rows per Table -** Select the number of blank rows to display in any updateable tables that are used by the application.
8. Select **Update** to save your changes.

2.2.5 Changing Default Responsibility

Responsibilities define application privileges, controlling the presentation of menus, tabs, and screens. For more information, see Understanding User Management.

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.

Note: These steps are for administrative users of the application. For general user steps, see the Changing Default Responsibility topic in the Using Oracle iSupport topic group.

Steps

1. Log in to the JTF login as the Oracle *i*Support Administrator or Primary User.
2. Navigate to **Administration** > **User**.
3. Search for the user whose information you wish to alter. See Searching for Users for directions.
4. Select the underlined hyperlink of the appropriate username. The Personal Profile page displays.
5. Select the **Responsibilities** link at the bottom of the page. The Responsibilities page displays.
6. If the desired responsibility is already apparent, select the radio button next to the default responsibility you wish to assign.
7. If the responsibility you wish to assign as the default is not already on the page:
   a. Click the underlined word, `Select`, to bring up the Responsibility search page.
   b. Select the desired responsibility from the search results, and the Responsibilities page will re-appear with the new responsibility listed.
   c. You can then select the Default radio button next to the responsibility.
8. Select **Save** in the Responsibilities screen to save changes.

2.2.6 Changing Default Customer Account

Use the following procedure to change the default customer account that displays when a user initially logs in.

Note: These steps are for administrative users of the application. For general user steps, see the Changing Default Customer Account topic in the Using Oracle iSupport topic group.

Steps

1. Log in to the JTF login as Oracle *i*Support Administrator or Primary User.
2. Navigate to **Administration** > **User**.
3. Search for the user whose information you wish to alter. See Searching for Users for directions.
4. Select the underlined hyperlink of the appropriate username. The Personal Profile page displays.
5. Navigate to the **Accounts** link. The Accounts page displays.
6. Select the checkbox next to the desired default account.
7. Select **Save**. The application returns a confirmation message.

2.2.7 Setting Homepage E-mail Subscription

Oracle *i*Support allows users to receive the contents of their Homepage in an e-mail. This is useful when users are unable to log in to Oracle *i*Support for whatever reason. This feature can be enabled by either the user himself or an administrator. Follow the administrator steps below to enable or disable this feature.

For general user steps, see the Enabling Homepage E-mail Submissions topic in the Using Oracle iSupport topic group.

Prerequisites

- A valid e-mail account has been recorded for the user who will receive the Homepage e-mails (see Adding/Changing Contact Points).
- Oracle Workflow has been set up and configured.
- To populate the tables required for this process, run the concurrent programs, Notification Mailer and Message Delivery Scheduler.

Steps

1. Login to the JTF login as Oracle *i*Support Administrator or Primary User.
2. Navigate to **Administration** > **User**.
3. Search for the user whose information you wish to alter. See Searching for Users for directions.
4. Select the underlined hyperlink of the username. The Personal Profile screen appears.

5. In the menu to the left, select **Support**. The Support screen appears.
6. In the Email Management: Subscription Content area, a list of available Homepage content will display. From the list, select the desired Homepage content.
7. In the Delivery Days area, choose the weekdays desired for e-mails.
8. In the Delivery Method area, select either HTML or Text as the type of e-mail.
9. Select **Update Subscriptions**. The application returns a confirmation message.

2.2.8 Setting User Signature for Forums

The forums signature is the text that will display automatically when a user posts a message to a forum. Use the following steps to alter or add the Forums signature for a user.

Note: The steps in this section are administrator steps. For general user steps, see the Setting Forums Signature topic in the Using Oracle iSupport topic group.

Steps

1. Login to the JTF login as Oracle *i*Support Administrator.
2. Navigate to **Administration** > **User**.
3. Search for the user whose information you wish to alter. See Searching for Users for directions.
4. Select the underlined hyperlink of the username. The Personal Profile screen appears.
5. In the menu to the left, select **Support**. The Support screen appears.
6. In the User Signature for Forums textbox, enter any text that you wish to display at the end of this user's forums postings.
7. Select **Update**. The application returns a confirmation message.

2.2.9 Adding/Changing Company Information

Modify company information by following the steps below. A user must be classified as a B2B (business user) user for company information to display.

Note: When you update company information for any user of a company, the company information for all users associated with this company will also change.

Steps

1. Log in to the JTF login as Oracle *i*Support Administrator or Primary User.
2. Navigate to **Administration** > **User**.
3. Search for a user within the company whose information you wish to alter. See Searching for Users for directions.
4. Select the underlined hyperlink of the username. The Personal Profile screen appears.
5. From the Company Profile menu on the left, select **Information**. The Company Information screen appears.
6. In the Company Information page, you can make changes to the following:
   - **Internal/External** radio buttons **-** Select whether this company is an internal or external company.
   - **Name of company -** Enter or change the name of the company.
   - ***SIC* -** Select the flashlight icon to select from a LOV of Standard Industrial Codes or North American Industrial Classification System (NAICS).
   - **Duns Number -** Record the DUNS number. The Dun & Bradstreet D-U-N-S Number is a unique nine-digit identification code, which is used to reference single business entities, while linking corporate family groups together.
   - **Number of Employees -** Record the number of employees of the company.
   - **Customer Since -** Record the date the company first became a customer.
   - **Current Revenue -** Record the company's current revenue.
   - **Projected Revenue -** Record the company's projected revenue.
   - **Analysis Year -** Record the year the revenue was analyzed.
   - **Fiscal Year End -** Record the date of the company's fiscal year end.
   - **Fiscal Code -** Record the fiscal code of the company.

- **Tax Reference Number -** Record the tax reference number of the company.

7. Select **Update** to save changes.

2.2.10 Viewing Administrators Information

Use the steps below to view a list of administrators for the application (generally, these will be users who are Oracle *i*Support Administrators or Primary Users.

Steps

1. Log in to the JTF login as Oracle *i*Support Administrator.
2. Navigate to **Administration**. Select the **Profile** button at the top of the screen.
3. Under Company Information on the left, select the **Administrators**. A list of application administrators displays. For B2B users, the administrators are the Primary Users for the organization to which the B2B user belongs.
4. To view available contact information, select the username hyperlink of the administrator.

2.3 Maintaining the Homepage

This topic group provides information on the following tasks:

- Adding MES Content to Homepage
- Using the Update Content Screen
  - Setting Homepage Content as Mandatory
  - Disabling Homepage Content
- Changing Mandatory Bin Layout/Display
- Enabling Homepage E-mails

Related topic:

- Understanding the *i*Support Homepage

2.3.1 Adding MES Content to Homepage

Oracle Marketing Encyclopedia System (MES) supplies some data for the Homepage, for example, the 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.

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, select the content that you wish to add by activating the appropriate checkbox.
4. Select **Save**. The Content Administration screen appears.

2.3.2 Understanding the Update Content Page

In the Update Content page, you can:

- Set Homepage Content as Mandatory
- Disable Homepage Content

2.3.2.1 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**.

2.3.2.2 Disabling Homepage Content

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

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**.

2.3.3 Changing Mandatory Bin Layout/Display

If you have more than one mandatory 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.
4. To arrange content vertically, select content and click the up or down arrow buttons to set the order.

5. Select **Update** to save changes.

2.3.4 Enabling Homepage E-Mail Subscription

The Homepage e-mail subscriptions feature of Oracle *i*Support allows users to receive Homepage content in e-mail form. This is useful if a user will not be able to access the Homepage for a period of time.

This topic contains the following subtopics:

- Setting up subscription template
- Running 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 the *Oracle iSupport Implementation Guide, Integrating Oracle iSupport with Oracle Workflow.*

2.3.4.1 Setting up Subscription Template

Subscription templates allow you to select the framework for the Homepage e-mails that a user will receive. Use the following procedure to set up the template.

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 name of the subscription template.
4. In the **Header** and **Footer** fields, enter the information you wish to display in the header / footer 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 / footer.
5. Select **Update**. A confirmation message displays.

2.3.4.2 Running the Subscriptions Concurrent Program

In Oracle (Forms) Applications, run the Notification Mailer and Message Delivery Scheduler concurrent programs. For more information on Oracle Workflow, see the chapter in the *Oracle iSupport Implementation Guide, Integrating Oracle iSupport with Oracle Workflow*. You should also consult the *Oracle Workflow User's Guide*.

2.4 Maintaining Service Request

This topic group provides information on the following tasks:

- Service Request Default Settings
- Service Request Templates

Oracle Support, also known as Oracle TeleService, provides the bulk of service request functionality in Oracle *i*Support. For any service request functionality in Oracle *i*Support, you must do a full install of Oracle Support/TeleService.

For more information on Oracle Support/TeleService, see the latest versions of the following documentation:

- *Oracle Support Concepts and Procedures*
- *Oracle Support Implementation Guide*
- Understanding Service Request in the Understanding Oracle *i*Support section of this guide
- *Integrating Oracle iSupport with Service Request* chapter of the *Oracle iSupport Implementation Guide*

2.4.1 Service Request Default Settings

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:

   Note: The source for most of the values displayed on the Request Management screen are values defined in TeleService. See the *Oracle Support Implementation Guide* for details.

   - **Default Severity -** Select the default severity to display in the LOV on the Create Service Request screen.
   - **Default Status -** Select the default status to display in the LOV on the Create Service Request screen.
   - **Closed Status -** Select the default closed status to display in the LOV on the Create Service Request screen.

   Default Create Notetype - Set a default for the note type used when a service request is created.

   Default Update Notetype - Set a default for the note type used when a service request is updated.

   Default Escalate Notetype - Set a default for the note type used when a service request is escalated.

   Default Closed Notetype - Set a default for the note type 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.

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**.

2.4.2 Service Request Templates

Service Request templates provide a structured, formatted method of gathering information during Service Request creation. See Understanding Service Request Templates for more information. 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
- Setting Severity Thresholds for Templates

- Setting Default Template
- Using the Save As Feature to Create New Templates
- Renaming Existing Templates
- Deleting Existing Templates

2.4.2.1 Creating New Templates

Use the steps below to begin creating a new Service Request template.

Prerequisite: Enable the service request template feature. Navigate to Administration > Support > Request Management. Set Enable Template to Yes. See Service Request Default Settings for more information.

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 is non-functional but still a recommended field. 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. Click on the hyperlink of the template name and continue creating the template by:
   - Selecting Effective Dates for Templates
   - Associating Products to Templates
   - Associating Urgencies to Templates
   - Defining Questions/Answers on Templates
   - Setting Severity Thresholds for Templates

2.4.2.2 Selecting Effective Dates for Templates

Use the following procedure to select effective dates for a template.

Prerequisites

- Oracle Support has been installed and configured. See the *Oracle Support Implementation Guide* for details.
- A service request template has been created in Oracle *i*Support.
- The Enable Template field on the Service Request Default Settings page has been set to Yes.

Steps

1. Log in at the JTF login as Oracle *i*Support Administrator.
2. Navigate to **Administration** > **Support** > R**equest Management** > **Template**. The Service Request Template Administration screen displays with a list of templates.
3. Select the underlined hyperlink of the desired template. The Modify Template screen appears.
4. 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**.

   Note: It is recommended that you 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.
5. Select **Update**. A confirmation message appears.

2.4.2.3 Associating Products to Templates

Use the steps below to associate product(s) to a template.

Prerequisites

- Oracle Support has been installed and configured. See the *Oracle Support Implementation Guide* for details.
- A service request template has been created in Oracle *i*Support.

- The Enable Template field on the Service Request Default Settings page has been set to Yes.
- Products have been set up in Oracle Inventory.

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 with a list of templates.
3. Select the underlined hyperlink of the appropriate template. The Modify Template screen displays.
4. In the Associate Attribute, Attribute to Associate: Product area, select **Modify**. The Associate Product screen appears.
5. 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.
6. Select **Update**.

2.4.2.4 Associating Urgencies to Templates

Use the steps below to associate urgencies to a template.

Prerequisites

- Oracle Support has been installed and configured, including the setup of urgencies. See the *Oracle Support Implementation Guide* for details.
- A service request template has been created in Oracle *i*Support.
- The Enable Template field on the Service Request Default Settings page has been set to Yes.

Steps

1. Log in at the JTF login as Oracle *i*Support Administrator.
2. Navigate to **Administration** > **Support** > **Request Management** > **Template**. The Service Request Template Administration screen displays with a list of templates.

3. Select the underlined hyperlink of the appropriate template. The Modify Template screen displays.
4. In the Associate Attribute, Attribute to Associate: Urgency area, select **Modify**. The Associate Urgency screen appears.
5. 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.
6. Select **Update**.

2.4.2.5 Defining Template Questions and Answers

Use the steps below to define questions and answers to a template.

Prerequisites

- Oracle Support has been installed and configured. See the *Oracle Support Implementation Guide* for details.
- A service request template has been created in Oracle *i*Support.
- The Enable Template field on the Service Request Default Settings page has been set to Yes.

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 with a list of templates.
3. Select the underlined hyperlink of the appropriate template. The Modify Template screen displays.
4. **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.
5. 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.

6. If your question requires a Choice-type answer, select (**yes** / **no**) whether you wish the answer to be used in the severity scoring (see Set Severity Thresholds below). If you choose, yes, answers to the question will be weighted from 1 to 9 during the answer setup (see Set up Answers for a Choice Question below).
7. 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**.
8. Select **Add**. The screen refreshes, with the question appearing as an underlined link in the Template Detail area.

   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.

   To edit a question, click on the hyperlink of the question you wish to modify.
9. **Set up Answers for a Choice Question**: In the Template Detail area, click on the underlined hyperlink of the question you are defining answers for. 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. The Define Question and Answer screen appears.
10. Enter an answer for the question in an empty textbox.

    For each **Choice-type** answer, set a **value/score** of 1 through 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 Defining Severity Thresholds, below).
11. 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 typing in the answer.

2.4.2.6 Defining Severity Thresholds for Templates

Use the following procedure to define severity thresholds for a template.

Prerequisites

- Oracle Support has been installed and configured, including the setup of severities. See the *Oracle Support Implementation Guide* for details.
- A service request template has been created in Oracle *i*Support.
- The Enable Template field on the Service Request Default Settings page has been set to Yes.

For more information, see:

- *Oracle iSupport Implementation Guide*: *Integrating Oracle iSupport with Service Request*
- Oracle Support documentation and courseware

Steps

1. Log in to the JTF login as the Oracle *i*Support Administrator.
2. Navigate to **Administration** > **Support** > **Request Management** > **Template**. The Service Request Template Administration screen displays with a list of templates.
3. Select the underlined hyperlink of the appropriate template. The Modify Template screen displays.
4. Use the Set Severity area to set Severity Thresholds for the template. The names of the severities listed on this page (e.g., high, medium, low) come from the severity setups in Oracle Support.

   The sum score from all of the scorable answers assigned to answers in the Defining Template Questions and Answers is determined by the application and compared to the total possible. The difference as a 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. 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%

5. When finished entering severity thresholds, select Update.

2.4.2.7 Setting 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

- Oracle Support has been installed and configured. See the *Oracle Support Implementation Guide* for details.
- A Service Request template has been created in Oracle *i*Support.
- The Enable Template field on the Service Request Default Settings page has been set to Yes.

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**.

2.4.2.8 Using the Save As Feature to Create New Templates

The Save As feature of Service Request Templates can be useful when you already have a template set up and wish to use it as a model or prototype when creating a new template. Use the following procedure to use the Save As feature.

Steps

1. At the JTF login, log in as the Oracle *i*Support Administrator.
2. Navigate to Administration > Support > Request Management > Template. The Service Request Template Administration screen displays with a list of templates.
3. Select the underlined hyperlink of the model template.
4. In the Modify Template screen, select Save As.
5. Enter a name the new template. Select Save. Edit the template as desired.

2.4.2.9 Renaming Existing Templates

Follow the steps below to rename a Service Request template.

Steps

1. At the JTF login, log in as Oracle *i*Support Administrator.
2. Navigate to Administration > Support > Request Management > Template.
3. Select a template.
4. In the Modify Template screen, enter the new name and/or short code for the template.
5. Select Update.

2.4.2.10 Deleting Templates

Follow the steps below to delete (disable) a template.

Steps

1. At the JTF login, log in as the Oracle *i*Support Administrator.
2. Navigate to Administration > Support > Request Management > Template.

3. Select the hyperlink of the template you wish to delete/disable.
4. Enter an immediate End Date for the template. It is recommended that you end-date a template to disable it, rather than using the Delete key.
5. Select Update to save changes.

2.5 Configuring 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.

2.5.1 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 iSurvey 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 3 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.*

2.5.2 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*.

2.5.3 Assign Survey Administrator Responsibility to an iSupport 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 Setting up iSupport Users topic in the *Implementation Tasks* chapter of the *Oracle iSupport Implementation Guide* 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.

2.5.4 Set up iSupport 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 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.

2.5.5 Make Survey Available in iSupport

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 the survey and usergroup in iSupport.

2.5.5.1 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**.

2.5.5.2 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.

2.5.5.3 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 respond to the created survey(s), log into Oracle *i*Support as a member of a usergroup associated with a survey, and navigate to **Support** > **Survey**.

2.5.6 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.

2.6 Configuring Call Me

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.

2.7 Administering Forums

Forums are interactive online discussion areas available to users. Forums are made up of categories containing forums or topic areas.

This topic group provides information on the following:

- Creating Categories
- Creating Forums
- Restricting Access to Categories or Forums
- Using Forum Moderators
- Maintaining Categories
- Maintaining Forums
- Maintaining Messages

2.7.1 Creating Categories

Categories help to organize forums into broader topic areas. Follow the steps below to create a category.

Related topic:

Creating Forums

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:

   Open - All users can view / access.

   Restrict - Only members of a usergroup 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.

2.7.2 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. Follow the steps below to create a forum.

Related topic:

- Creating Categories

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. You can choose to have the forum exist at the topmost (root) level, or you can structure the new forum to be a topic area within a category.

   To have the new forum exist at the root level, leave the Choose the parent category of the new forum field set to Root.

   To place the forum underneath a category, select the parent category from the Choose a parent category drop-down list.

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 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.

2.7.3 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.

2.7.3.1 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.

2.7.3.2 Create Usergroup

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

1. Log in to the JTF login screen as the Oracle *i*Support Administrator.
2. Navigate to **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 Statement

   ```
   select employee_id from fnd_user where employee_id > 0
   ```
   Note: Usergroup creation also supports party_id. It will not support user_id.
8. Select **Save**.

2.7.3.3 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.

2.7.3.4 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.

2.7.4 Using Forum Moderators

A forum moderator is a user designated to handle some 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 messages can only be viewed by employee users
- Delete message threads

Forum moderator 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 and deleting forum moderator are below. See Maintaining Messages for more information on forum moderator tasks.

2.7.4.1 Create Forum Moderator

Use the procedure below to create a forum moderator.

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. See Searching for Users for more details on how to search for users.
7. After you have entered the appropriate name in the textbox, select **Add**. A confirmation message displays.

2.7.4.2 Delete Forum Moderator

Use the steps below to remove a moderator from a forum.

Prerequisite

A forum moderator has been created.

Steps

1. Log in to the JTF login screen as the Oracle *i*Support Administrator.
2. Navigate to **Administration** > **Forum** > **Forum** > **Modify Attributes**. The Modify Forum Attributes page displays.
3. From the drop-down list, select the forum from which to remove a moderator.
4. Select **Next**. The Modify Forum Attribute screen displays.
5. Select a moderator to remove.
6. Under Moderator List, select **Delete**.

2.7.5 Maintaining Categories

This topic group contains information on the following tasks:

- Deleting Categories
- Renaming Categories

For information on restricting access to categories (changing the status to restrict), see Restricting Access to Categories or Forums.

2.7.5.1 Deleting Categories

Use the steps below to delete a category. When you delete a category that has sub-categories and/or forums within it, all of the associated sub-categories/forums will also be deleted.

Steps

1. Log in to the JTF login screen as the Oracle *i*Support Administrator.
2. Navigate to **Administration** > **Forum** > **Category** > **Delete**. The Remove Category page displays.
3. In the Choose a category to remove drop-down box, select the appropriate category.
4. Select **Ok**. Respond to the confirmation message.

2.7.5.2 Renaming Categories

Use the steps below to rename a category.

Steps

1. Log in to the JTF login screen as the Oracle *i*Support Administrator.
2. Navigate to **Administration** > **Forum** > **Category** > **Rename**. The Rename Category page displays.
3. Select the category to rename from the drop-down list.
4. Type the new name in the Enter the new name of the category textbox.
5. Select **Modify**. Respond to the confirmation message.

2.7.6 Maintaining Forums

This topic group includes instructions for common forum maintenance tasks performed by the Oracle *i*Support Administrator, including:

- Deleting Forums
- Renaming Forums
- Moving Forums
- Modifying Forum Attributes

For information on restricting access to forums (changing status to restrict), see Restricting Access to Categories or Forums.

2.7.6.1 Deleting Forums

Use the steps below to delete a forum.

Steps

1. Log in to the JTF login screen as the Oracle *i*Support Administrator.
2. Navigate to **Administration** > **Forum** > **Forum** > **Delete**. The Remove Forum page displays.
3. Select the forum to delete from the drop-down list.
4. Select **Remove**. Respond to the confirmation message.

2.7.6.2 Renaming Forums

Use the steps below to rename a forum.

Steps

1. Log in to the JTF login screen as the Oracle *i*Support Administrator.
2. Navigate to **Administration** > **Forum** > **Forum** > **Rename**. The Rename Forum page displays.
3. In the Choose a forum to rename drop-down box, select the appropriate forum.
4. Type a new name in the Enter new forum name text box.
5. Select **Modify**. Respond to the confirmation message.

2.7.6.3 Moving Forums

Use the steps below to move a forum from its current category to another category.

Steps

1. At the JTF login, log in as the Oracle *i*Support Administrator or Forum Moderator.
2. Navigate to **Administration** > **Forum** > **Forum** > **Move**. The Move Forum page displays.
3. From the Choose a forum to move drop-down box, select the appropriate forum.
4. Select a destination category from the Choose its destination Category drop-down box.
5. Select **Move**. Respond to the confirmation message.

2.7.6.4 Modifying Forum Attributes

The administrator may add, modify or delete Attributes to a Forum in order to increase the organizational and searching capacities of the Forum. This topic group includes:

- Add New Attribute
- Modify Existing Attribute
- Delete Attribute

Add New Attribute

Follow these steps to add an attribute.

Steps

1. At the JTF login, log in as the Oracle *i*Support Administrator.
2. Navigate to **Administration** > **Forum** > **Forum** > **Modify Attributes**. The Modify Forum Attributes page displays.
3. Select the appropriate forum from the drop-down list.
4. Select **Next**. The Modify Forum Attribute screen re-displays. Under Attribute List, select **Add New Attribute**. The Add Forum Attributes page displays.
5. Enter the name of the new attribute in the Header Name field.

6. Activate the **Mandatory** checkbox only if you want to require users to fill in an attribute when posting to the forum.
7. Enter the value of the attribute in the Header Value textbox. The optional header value field will become the default value for this attribute.
8. Select **Save**. Respond to the confirmation message.

Modify Existing Attribute

Follow these steps to modify an existing forum attribute.

Steps

1. At the JTF login, log in as the Oracle *i*Support Administrator.
2. Navigate to **Administration** > **Forum** > **Forum** > **Modify Attributes**. The Modify Forum Attributes page displays.
3. Select the forum whose attribute you wish to modify from the drop-down list.
4. Select **Next**. The Modify Forum Attribute screen re-displays.
5. Select the **Edit** underlined link next to the appropriate attribute.
6. Enter a new name in the Header Name field.
7. Activate the **Mandatory** checkbox only if you want to require users to fill in an attribute when posting to the forum.
8. Enter the value of the attribute in the Header Value textbox. The optional header value field will become the default value for this attribute.
9. Select **Save**. Respond to the confirmation message.

Delete Attribute

Follow these steps to delete an attribute.

Steps

1. At the JTF login, log in as the Oracle *i*Support Administrator.
2. Navigate to **Administration** > **Forum** > **Forum** > **Modify Attributes**. The Modify Forum Attributes page displays.
3. Choose the forum whose attribute you wish to delete from the drop-down list.
4. Select **Next**. The Modify Forum Attribute screen re-displays.

5. Select the **Delete** underlined link next to the appropriate attribute.
6. Respond to the confirmation message.

2.7.7 Maintaining Messages

This topic group includes information on the following forum moderator and/or application administrator tasks:

- Deleting Messages
- Moving Messages
- Changing the Active Status of Message Threads
- Changing the Distribution Status of Message Threads

2.7.7.1 Deleting Messages

Use the steps below to delete messages or message threads (groups of messages).

Steps

1. At the JTF login, log in as the Oracle *i*Support Administrator or Forum Moderator.
2. Navigate to **Administration** > **Forum** > **Messages**. The Message Management page displays.
3. From the drop-down list, select the forum that contains message to be deleted.
4. Select **Next**. The Message Management screen displays a list of all messages in the forum, the dates they were posted and the authors' names.

   To expand all threads, select Expand All. To collapse all threads, select Collapse All.
5. To delete a message, select the checkbox next to the message and then select **Delete**.

   To delete a message thread, select all of the messages in the thread and then select **Delete**.

2.7.7.2 Moving Messages

Use the steps below to move messages from one forum to another forum.

Steps

1. At the JTF login, log in as the Oracle *i*Support Administrator.
2. Navigate to **Administration** > **Forum** > **Messages**. The Message Management page displays.
3. From the drop-down list, select the forum that contains message to be moved.
4. Select **Next**. The Message Management screen displays with a list of all messages, the dates they were posted and the authors' names.

   To expand all threads, select Expand All. To collapse all threads, select Collapse All.
5. To move a message, select the checkbox next to the message you wish to move and then select **Move**.

   To move a message thread, select all of the messages in the thread and then select **Move**.
6. From the drop-down list, select the destination forum for the message and select **Ok**.
7. A confirmation screen appears.

2.7.7.3 Changing the Active Status of a Message Thread

Use the steps below to change the active status of a message thread.

Steps

1. At the JTF login, log in as the Oracle *i*Support Administrator or Forum Moderator.
2. Navigate to **Administration** > **Forum** > **Messages**. The Message Management page displays.
3. From the drop-down list, select the appropriate forum. Select **Next**. The Message Management screen displays with a list of all messages, the dates they were posted and the authors' names.
4. In the Active Status column, select either **Open** or **Close** from the drop-down list. Close status disables the message(s).

2.7.7.4 Changing the Distribution of a Message Thread

Use the steps below to change the distribution status of a message thread.

Steps

1. At the JTF login, log in as the Oracle *i*Support Administrator or Forum Moderator.
2. Navigate to **Administration** > **Forum** > **Messages**. The Message Management page displays.
3. From the drop-down list, select the appropriate forum. Select **Next**. The Message Management screen displays with a list of all messages, the dates they were posted and the authors' names.
4. In the Distribution Column, select either **Public** or **Internal** from the drop-down list.

   Public - All categories of users can see and reply to the message thread.

   Internal - Only employees of the merchant and the application administrator (or forum moderator) can see and reply to the message thread.
5. Select **Save**.

3

Using Oracle *i*Support

This topic group provides process-oriented, task-based procedures for using Oracle *i*Support for Release 11*i* (11.5.6). This topic group covers general user navigation and screen functionality, and explains how to use the fields and other relevant elements within the screens.

For conceptual information regarding the application, please see the **Understanding Oracle iSupport** topic group (online help) and chapter (PDF version) of the *Oracle i*Support *Concepts and Procedures*.

For task-based administrator procedures necessary for ongoing application maintenance, please see the **Administering Oracle iSupport** topic group (online help) or chapter (PDF version) of the *Oracle iSupport Concepts and Procedures*.

For setup information regarding the application, please see the *Oracle iSupport Implementation Guide*. The implementation guide is released in both in HTML and PDF, with the most recent PDF version at Oracle MetaLink (http://metalink.oracle.com) and the most recent HTML version on the Oracle Applications CD-ROM. Please visit the Oracle Documentation Center (http://docs.oracle.com) to order printed copies of the guides.

Topics in this section include:

- User Interface Basics
- Performing Searches
- Using the Homepage
- Using Service Request
- Using Accounts
- Using Returns
- Using Products/Oracle Install Base

- Using Forums
- Requesting a Support Call-back
- Responding to Surveys
- Changing User Profile Information
- Using Knowledge Management

3.1 User Interface Basics

This topic area provides basic user interface (UI) concepts.

- **Go Button -** The Go button next to certain text boxes allows you to access a list of values (LOV) associated with that field. It is used to select items to enter into the textbox. Once the LOV pops up, select the entry of your choice using the radio button. On most LOVs you will need to select Submit for the textbox to be populated.
- **Drop-List -** A box with a down arrow next to it indicates that you select an entry from a drop-down box. Click on the down arrow and make your selection with the mouse.
- **Textbox -** A plain textbox indicates a field where you can type free text.
- **Required Fields -** An asterisk next to any field indicates that the entry is mandatory.
- **Calendar Icon -** The Calendar icon is used to set start or end dates for applicable procedures. Click the icon to view a calendar, then select a date to populate appropriate field.
- **Using the Tabs -** There are five main tabs in the general user UI, each with its own set of subtabs:
  - **Home -** This tab accesses the Homepage for the application. Your personalized Homepage consists of bins containing links to frequently used information that you set up (such as tracked Service Requests), and items supplied by the application administrator, such as links to Technical Library documents or Support links. The Homepage has no subtabs. See Using the Homepage for more information.
  - **Account -** The Account tab gives users access to transactions information, such as order details, invoices, payments, returns, contracts, and shipments. Account tab subtabs are: Orders, Invoices, Payments, Contracts, Returns, and Service Requests. See Using Accounts for more information.

- **Products -** The Products tab allows users to access and search their install base data, and to add products to their install base. Oracle Install Base is a repository of a customer's product purchase information, including purchase date, product attributes, and applicable service agreements. The Products tab has one subtab: Summary. See Using Install Base for more information.
- **Support -** By accessing the Support tab, users can create and track service request information, search the knowledge base, request call-backs from support agents, and respond to surveys. Support tab subtabs are: Ask Me, View / Update Requests, Create Request, Call Me, and Survey. See Using Service Request, Using Knowledge Management, Requesting a Support Call-Back, and Responding to Surveys for more information.
- **Forum -** Users can access the interactive online Forums functionality from this tab. The Forums tab has no subtabs. See Using Forums for more information.

Note: Employee Users will only see the Home, Support (subtabs: Ask Me, View / Update Requests, and Create Request), and Forum tabs.

3.2 Performing Searches

This topic group provides instructions for performing searches within the application. Topics include:

- Using Quick Find
- Searching Service Requests
- Searching Accounts / Transactional Inquiries
- Searching Install Base
- Searching Forums
- Searching the MES Technical Library

For information on searching the knowledge base, please see: Using Knowledge Management.

3.2.1 Using Quick Find

Quick Find is the drop-down list displayed beneath the subtabs on all of the main application screens. To use Quick Find, select the appropriate item from the drop-down list, enter search criteria in the text field, and click Go.

Note: You may use the % character as a wildcard when searching.

Quick Find can help you locate:

Service Requests - Use the exact Service Request number; partial numerical values are not supported. To search by service request summary field, enter partial values, using the % sign as a wildcard. For example, t%% will find all service requests whose summary field begins with T.

Solutions - Enter partial or complete search criteria to find solutions in the knowledge base. For example, if you know the number of a solution in the database, enter it in the textbox. Or, enter a partial alphabetical value, using the % sign as a wildcard, to find text entries.

Library - Enter partial or complete search criteria to locate documents in Marketing Encyclopedia System (MES)/Technical Library. Enter a partial alphabetical value, using the % sign as a wildcard, to find entries.

Forums - Search within Forums postings by entering full or partial values in the textbox. Enter a partial alphabetical value, using the % sign as a wildcard, to find forum entries. Forums also has an advanced search feature. See Using Forums for more information.

Install Base - Enter known criteria to find products in the install base. Install Base also has its own search feature. See Using Install Base for more information.

3.2.2 Searching Service Requests

Oracle *i*Support allows you to search for service requests that you have created. Use the following procedure to search for service requests.

Steps

1. Within Oracle *i*Support, navigate to **Support** > **View/Update Requests** > **Search**. The Search Service Requests screen displays.
2. Enter values, as desired, for the following:

   Service Request Number - Enter an exact service request number.

Project Number - Enter a specific Project Number number if you wish the search results to display information only from a specific project.

Help Desk Number - Enter a specific Help Desk Number number if you wish the search results to display information only from a specific help desk number.

Date Created - Select a date range within which the service request(s) would have been created.

Last Update Date - Select a date range within which the service request(s) would have been updated.

Account Number - Select the appropriate account number. Or, leave set to All to capture information from all accounts associated with this user. This account number is the account number for the user in the Trading Community Architecture.

Request Type - Select All or a reduction criteria of the request type used when the request(s) was created.

Status - Select All or a reduction criteria of the status of the request(s).

Urgency - Select All or a reduction criteria of the urgency of the request(s).

Product - Select a product for which service request(s) have been created.

3. In the Display Options area, select the data you wish to display in the search results by moving items from the left column to the right column (>). Sort the selected items by using the up and down arrow buttons.
4. In the Sort Options area, you can select three different sort criteria to order the Display Options you selected in the previous step. The top choice, Sorted By, will take precedence over the other two, and the second choice, Then By, will take precedence over the bottom choice. Selecting Ascending will sort the data by first to last (whether alphabetic or numeric), and Descending will sort the data by last to first.
5. Select **Search**. The View Service Requests screen displays with the search results displayed in table format. If no service requests are found that match your search criteria, the UI will display a *no records found* message.

3.2.3 Searching Account Information

The search function within the Account tab of Oracle *i*Support allows you to search your orders, invoices, payments, and contracts data.

To search for data within the Account tab, use the following procedure:

Steps

1. Within Oracle *i*Support, navigate to the **Account** tab.
2. Select one of the following subtabs: Orders, Invoices, Payments, Contracts.
3. Select an account number to search within. Account numbers are assigned when your username is created within the system.
4. In the Search drop-down list, select a search criteria, for example, *order number.*
5. In the constraint operator drop-down list, select a criteria, for example, *greater than*.
6. In the textbox, enter search information that corresponds to the search criteria chosen in the drop-down list.
7. Select **Go** to perform the search.

3.2.4 Searching Install Base

Please see the topic, Using Saved Searches for information on searching Install Base.

3.2.5 Searching Forums

Follow the guidelines below to use the Forums search function.

1. Within Oracle *i*Support, navigate to the **Forum** > **Advanced Search**.
2. Enter data in any one or all of the following fields:

   Message Number - This is the system-generated message number.

   Subject Keyword(s) - Enter (case insensitive) keywords that may be in the message headers (subject) of the appropriate messages. You can enter more than one word in this field, using the % sign as a wildcard, but your **search criteria must match the exact order of the wording** found in the subject field.

   Example: You are having a problem closing your CD-ROM tray and wish to search for messages that relate to this subject. In this example, there is a message with the subject, *Unable to close CD-ROM tray.* If you enter `unable%CD` in the search field, it will find the message. But, if you enter `CD%unable`, the system will not find the message because the search criteria is not in the exact order of the information from the subject field.

   Message Keyword(s) - Enter (case-insensitive) keywords that may be in the bodies of applicable messages. You can enter as many words as you like, and there is no need to use a plus sign (+) here, although you can use it you like. Also, the words do not need to be in any particular order.

Category - Leave the drop-down list set to All to search all categories, or restrict the search to a particular category by choosing the category from the list.

Forum - Leave the drop-down list set to All to search all forums, or restrict the search to a particular forum by choosing the forum from the list.

Posted Between - Use the calendar icon to the right of the first textbox to select a date to begin searching from, and use the calendar icon to the right of the second textbox to select an end date.

Author - Select the Myself radio button to find messages posted by you. To find messages written by others, select the Others radio button and enter the name of the author of the message. Use the format <first name> <space> <last name>.

Message Status - Choose from the radio buttons: **Read** will only search messages that have been viewed by a user. **Unread** will only search messages that have not been viewed by a user. **All** will search both types.

3. Select **Search**. The application will return a list of messages matching your search criteria. If no messages are found, the system will return the message, *No messages were found to match the search criteria*.

3.2.5.1 Forum Search Results

Forum search results are organized into a table with the following columns:

Subject Name - Message header or subject.

Author - Name of the person who posted the message.

Date - Date the message was posted.

To view a message in the results list, click the hyperlink in the Subject Name column. You will then be able to reply to the message or start a new message thread within the forum.

To begin a new search, select the **Search Again** button and follow the steps above in Searching Forums.

3.2.6 Searching MES Technical Library

Oracle Marketing Encyclopedia System (MES), also known as Technical Library, enables searching within Oracle *i*Support technical documents. These documents may include, for example, white papers, user guides, and FAQs. Use the following procedure to search the Technical Library:

Steps

1. Within Oracle *i*Support, navigate to **Support** > **Ask Me**. Select the T**echnical Library** hyperlink.
2. Technical Library items that have been set up by the application administrator in MES will display.
3. To view a category and/or document, select the appropriate link.

3.3 Using the Homepage

Oracle *i*Support's Homepage is the landing screen for your initial interaction with the application. Your personalized Homepage consists of bins containing links to frequently used information that you set up (such as tracked service requests), and items supplied by the application administrator, such as links to Marketing Encyclopedia System (Technical Library) documents or Support links.

The following topics can assist you in setting up and maintaining the Homepage:

- Choosing Homepage Content
- Changing Homepage Display
- Enabling Homepage E-mail Subscription
- Tracking Service Requests on the Homepage

3.3.1 Choosing Homepage Content

A variety of content can be added to your Homepage. Some content is configured by the application administrator to display mandatorily on your Homepage. Other content can be selected - and its layout chosen - by you.

Follow the steps below to select the content for your Homepage.

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

3. After making your selections, click **Update** to save changes.
4. Return to the Homepage to verify that you can see the content.

3.3.1.1 Using the Edit Hyperlinks on Homepage Bins

Certain bins on your Homepage are editable, meaning you can choose which data items display in them. For example, for a Service Request Quick Links bin, you can select which fields to display in the bin, such as service request number, submit date, service request status, etc. Bins that are editable/configurable by the user have an **Edit** hyperlink at the top of the bin.

3.3.1.2 Using the Close Hyperlinks on Homepage Bins

You can also close certain bins on your Homepage simply by clicking on the **Close** hyperlink at the top of the bin.

Related topic:

Tracking Service Requests on the Homepage

3.3.2 Changing Homepage Display

Information on your Homepage displays in content areas, known as bins, which are organized into either a 3-column (wide) or 2-column (narrow) layout. Wide columns are twice as wide as narrow columns.

You can also change the order of the bins by sorting them vertically.

Steps

1. Within Oracle *i*Support, navigate to **Home** > **Layout** *or* **Home** > **Content** > **Change Layout**. The Personalize Layout screen displays.
2. In the Personalize Layout screen, if your content is currently in a 2-column layout, there will be a hyperlink at the top of the Narrow Column/Wide Column bins that reads, *Switch to 3 column layout*. If your content is currently in a 3-column layout, the hyperlink will read, *Switch to 2 column layout*.

   Select either the 2-column or 3-column layout as desired.
3. Information displayed in the columns will be listed in the appropriate window. To move information from one column to another, click on the topic and use the arrow buttons move it right or left.
4. Use the up and down arrow buttons to change the vertical order of the bins.

Note: You will not be able to change the display of mandatory content (content that is set by the administrator to be required on your Homepage). Mandatory content items will be marked with an asterisk (*).

5. Click **Update** to save changes. You will be returned to the Homepage, where you can verify that the changes were made.

3.3.3 Enabling Homepage E-mail Subscriptions

Oracle *i*Support allows users to receive the contents of their Homepage in an e-mail. This is useful when users are unable to log in to Oracle *i*Support for whatever reason. This feature can be enabled by either the user himself or an administrator. Follow the steps below to enable or disable this feature.

Prerequisite

A valid e-mail account has been recorded for the user who will receive the Homepage e-mails (see Adding/Changing Contact Points).

Steps

1. With Oracle *i*Support, select the **Profile** button at the top of the screen. The Personal Profile page displays.
2. In the menu to the left, select **Support**. The **Support** screen appears.
3. In the Email Management: Subscription Content area, a list of available Homepage content will display. From the list, select the desired Homepage content.
4. In the Delivery Days area, choose the weekdays desired for e-mails.
5. In the Delivery Method area, select either HTML or Text as the type of e-mail.
6. Select **Update Subscriptions**. The application returns a confirmation message.

3.3.4 Tracking Service Requests on Homepage

There are two ways to track service request activity on the Homepage: Set up the Service Request Bin, which contains service request saved views; and set up the Service Request Quick Links bin, which contains bookmarked service requests.

Note: General users of the application only have access to their own service request activity. Administrators of the application and possibly merchant agents (depending upon the application configuration) can access all users' service request activity.

Sections in this topic group are:

- Setting up Service Request Bin
- Setting up Service Request Quick Links Bin

Note: If one or both of these bins is not displaying on your Homepage, you may not have selected the bins as Content items. Follow the steps in Choosing Homepage Content to select them as Content items.

3.3.4.1 Setting up Service Request Bin

You can set up the Service Request Bin on the Homepage to track your service request activity. Follow the steps below to set up or edit the bin.

Steps

1. Within Oracle *i*Support, navigate to the Homepage.
2. Select the **Edit** link on the Service Request bin (not the Service Request Quick Links bin). The Edit Service Request Content screen displays.
3. Select **Create View**. The Create Service Request View screen displays.
4. Choose values for the following:
   - **View Name -** Enter a name for the view in the View Name textbox.
   - **Rows per Page -** Enter a value for the number of rows to display in the bin.
   - **Default View -** Select Default View to make this view the default that displays. The default view will be the one displaying on the Homepage. This is useful if you have more than one view set up.
5. In the Filters area, enter values that will determine which service request characteristics will display in the bin. Enter values, as desired, for the following:
   - **Service Request Number -** Enter a specific Service Request number if you wish the bin to display information about a specific service request.
   - **Project Number -** Enter a specific Project Number number if you wish the bin to display information only from a specific project tied to a created Service Request.
   - **Help Desk Number -** Enter a specific Help Desk Number number if you wish the bin to display information only from a specific help desk number tied to a created Service Request.

- **Date Created -** Select the date range within which the requests you wish to display were created.
- **Last Update Date -** Select the date range that the requests you wish to display were last updated.
- **Account Number -** Select the appropriate account number. Or, leave set to All to capture Service Requests for all accounts associated with this user. This account number is the account number for the user in the Trading Community Architecture.
- **Request Type -** Select All or a reduction criteria of the request type used when the request(s) was created.
- **Status -** Select All or a reduction criteria of the status of the request(s).
- **Urgency -** Select All or a reduction criteria of the urgency of the request(s).
- **Product -** Select a product for which requests have been created.

6. In the Display Options area, select the data you wish to display by moving it from the left column to the right column (>). You may order the data by using the up and down arrow buttons.

   Note: You must select at least one Display Option.

7. In the Sort Options area, you can select three different sort criteria to order the Display Options you selected in the previous step. The top choice, Sorted By, will take precedence over the other two, and the second choice, Then By, will take precedence over the bottom choice. Selecting Ascending will sort the data by first to last (whether alphabetical or numeric), and Descending will sort the data by last to first.
8. Select **Save View** and then **Save Selection** after the screen refreshes.
9. The Homepage displays, with the view showing in the Service Requests bin.

   To edit the bin, select the appropriate view from the drop-down list and follow the steps above.

3.3.4.2 Setting up Service Requests Quick Links Bin

The Service Requests Quick Links bin contains a list of service requests that you have bookmarked using the **Add to Service Request Quick Links** button available in the Confirmation of Service Request screen or the Service Request Detail screen. Use the following procedure to set up this bin.

Note: The Add to Service Request Quick Links buttons will only display if the user has set up the Service Requests Quick Links bin to display.

Steps

1. Within Oracle *i*Support, navigate to the Homepage.
2. Select the **Edit** button on the Service Request Quick Links bin (not the Service Request bin). The Edit Service Request Quick Links Content screen displays.
3. In the Display Options area, select service request characteristics that you wish to include from the Options window and move them to the Selected Options window using the arrow button (>).

   To remove a characteristic from the display, move it from the Selected Options window to the Options window.

   Sort the data if desired by using the up and down arrow keys.
4. In the Sort Options area, you can select three different sort criteria to order the Display Options you selected in the previous step. The top choice, Sorted By, will take precedence over the other two, and the second choice, Then By, will take precedence over the bottom choice. Selecting Ascending will sort the data by first to last (whether alphabetical or numeric), and Descending will sort the data by last to first.
5. Enter a value for the number of rows of quick links to display in the bin.
6. Select **Save** to save your work.
7. The Homepage displays with the changes made.
8. To delete items from the bin, select the underlined *Service Request Quick Links* hyperlink on the top of the bin, and then select the remove icon next to the appropriate quick service request.

3.3.5 Using the Quick Links Bin

Knowledge base results can be bookmarked and organized into a bin on your Homepage by utilizing the **Add to Quick Links** button on applicable screens.

- To view one of the bookmarked items, select the underlined hyperlink of the item.
- To remove a quick link from the bin, select the underlined *Quick Links* hyperlink on the bin itself, and then select the remove icon next to the appropriate quick link.

Use the following procedure to change the display properties of the bin.

Steps

1. Within Oracle *i*Support, navigate to the Homepage. Select the **Edit** button on the Quick Links bin (not the Service Request Quick Links bin). The Edit Quick Link Content screen displays.
2. Choose whether the name, description, or both name and description appear in the bin. In the Display Options area, select:
   - **Quick Link Name -** Activate this checkbox to display the name of the quick link in the bin. In the bin, quick link name shows up under the Quick Link column. The Quick Link Name is generated by the application when you bookmark an item.
   - **Quick Link Description -** Activate this checkbox to display the descriptive text name of the quick link in the bin. In the bin, the quick link description shows up under the Description column. The Quick Link Description is generated by the application when you bookmark an item.
3. Choose how the content is sorted. In the Sort Options area:
   - **Sorted By LOV -** Select the primary sort criteria, either Name or Description. If you select Name, the system will sort all content items by name. If you select Description, the system will sort all content items by the description. The Ascending/Descending choice tells the system to sort - alphabetically or numerically - the name or description either first-to-last or last-to-first.
   - **Then By LOV -** Select the secondary sort criteria. The criteria chosen in the Sorted By LOV will take precedence over any sort criteria chosen here.
4. Enter the number of rows to display in the Number of Rows Displayed textbox.
5. Select **Save** to save changes.

3.4 Using Service Request

This topic group provides information regarding Service Request functionality, including:

- Creating Service Requests
- Using Service Request Profiles
- Using Service Request Saved Views

- Changing Service Request Status
- Searching Service Requests

For directions on how to search for service requests, see Searching Service Requests in the Performing Searches area.

3.4.1 Creating Service Requests

Oracle *i*Support allows users to create service requests online.

Note: Oracle *i*Support features Service Request Profile functionality which can assist your data entry when creating service requests. See Using Service Request Profiles for instructions.

Steps

1. Within Oracle *i*Support, navigate to **Support** > **Create Request** or click Create Service Request link in the How Can We Help You? section on your Homepage.
2. Optionally, in the Create Service Requests screen, choose a Service Request Profile to associate with the service request. See Using Service Request Profiles for more information.
3. If you select a profile, the fields you specified in the profile will be populated. If you have not chosen a profile, in the Contact Information area fill in the following:
   - **Account Number -** Choose the Account Number to associate with the service request.
   - **Primary Contact -** Select Primary Contact for the service request.
   - **Contact By -** In the Contact by drop-down list, select the preferred method of contact. These are the contact points set up for your username in the Contact Points screen accessible through the Profile button.
4. In the Service Request Details area, enter/select the following:

   Mandatory fields will be marked with an asterisk (*).

   - **Request Type -** Choose the closest applicable Request Type for the service request.
   - **Product Information -** Enter product information if the service request relates to a product. You can either choose from all serviceable products in Inventory, or only the products in your install base.

Guidelines for Product Searching:

- To search from all products in Inventory, *deactivate* the S**elect from products I own checkbox** and click the flashlight icon. A List of Values will display from which you can select the appropriate product.
- To search from all products in your install base, *activate* the **Select from products I own checkbox** and click the flashlight icon. A List of Values will display from which you can select the appropriate product.
- Use the Category field to search by category.

For more information on the install base, see Using Products.

- **Version -** From the drop-down list, choose the Version Number of the product, if known.
- **Urgency -** From the drop-down list, select the most appropriate Urgency that describes the reason you are submitting the Service Request. If you are requesting information or a phone call, select RFI Only. Urgencies reflect the customer's perceived urgency of the problem.
- **Problem Code -** From the drop-down list, choose the Problem Code, if applicable.
- **Project Number -** In the Project Number textbox, enter a project number, if applicable.
- **Help Desk -** In the Help Desk Number textbox, enter a help desk number if appropriate.
- **Request Summary -** In the Request Summary textbox, enter a summary of the problem or expected resolution.

5. Optionally, attach a file(s) to your service request. Attachments can be of any size or type:

   To select an attachment: In the Attachments area, select the flashlight icon. In the Add Attachment screen, enter the filename (including the exact path and the file extension) and click **Attach**. To attach a file by locating the file on your computer, select **Browse** and follow your operating system directions for attaching a file.

6. Optionally (see note below) select **Search Knowledge Base** to perform a keyword search based on the description you entered in the Summary text field of your service request.

> **Note:** You may be required to search the knowledge base before submitting the service request, depending upon the settings that the application administrator has determined.

From the list of knowledge base search results, you can view the problems/solutions listed. If the problem or solution you view solves your issue, respond appropriately.

> **Note:** Responding affirmatively to a knowledge base search during service request creation will cause the service request submission process to be abandoned.

If the knowledge base search result does not solve your problem, respond appropriately to the screen prompts and return to the Create Service Requests screen.

7. As you continue creating the service request, respond to any questions that may be posed. Or, from the drop-down list, select a Note Type for the service request.

> **Note:** You will either be solicited to answer questions about the service request **or** select a Note Type, but not both. Questions come from service request templates that the administrator has set up. Note Types are set up in the Oracle Forms application and are used to help categorize service requests. If an applicable template is being used with this service request, a Note Type will not be used.

8. In the Verify Service Request screen, verify that you have entered the information correctly. If necessary, select **Modify Section Above** to modify the details you have entered.
9. Select **Submit Service Request** to submit the request. If the submission was successful, the Confirmation of Service Request screen displays. Make a note of the Service Request Number (you can also print the details).

10. Optionally, to have the confirmation information sent to you via e-mail, click **Email this to me**.

    Note: You must have a valid e-mail address set up in your Contact Points in order to receive service request details via e-mail. (Oracle *i*Support utilizes Oracle Workflow Mailer to process e-mails; consult your application administrator for troubleshooting assistance.)

11. Optionally, to add this service request to your service requests quick links bin tracking bin on the Homepage, select **Add to Service Request Quick Links**. See Tracking Service Requests on the Homepage for more information.

3.4.2 Using Service Request Profiles

A service request profile speeds your data entry during service request creation by allowing you to associate a collection of information (such as account number, contact information, or product details) with a service request at the time of submission. You can set up as many profiles as you wish. This topic group contains:

- Creating a Service Request Profile
- Editing a Service Request Profile
- Deleting a Service Request Profile

3.4.2.1 Creating a Service Request Profile

Use the steps below to set up a service request profile. All of these steps are optional to service request creation.

Steps

1. Within Oracle *i*Support, navigate to **Support** > **Create Request** > **Add**. The Create Service Request Profile screen displays.
2. In the Create Service Request Profile screen, enter a unique name for the profile in the Service Request Profile textbox.
3. In the Contact Information area, select an Account Number to associate with the profile.
4. Select the Primary Contact person to associate with the profile.
5. Select the preferred method of contact (email, phone, fax) in the Contact by drop-down list

6. In the Service Request Details area, select a Request Type for the Service Request.

7. Enter product information if you wish to associate a product with the profile. You can either choose from all serviceable products in Inventory, or only the products in the Install Base.

Guidelines for Product Searching:

- To search from all products in Inventory, deactivate the Select from products I own checkbox and click the flashlight icon. A List of Values will display from which you can select the appropriate product.
- To search from all products in your install base, activate the Select from products I own checkbox and click the flashlight icon. A List of Values will display from which you can select the appropriate product.
- Use the Category field to search by category.

For more information on the install base, see Adding Products to Install Base.

8. From the drop-down list, choose the Version Number of the product, if known.

9. From the drop-down list, select an Urgency that best describes the profile.

10. From the drop-down list, choose a Problem Code, if known.

11. To associate a project number with the profile, enter an appropriate number in the Project Number field.

12. To associate a help desk number with the profile, enter an appropriate number in the Help Desk field.

13. Select **Save**. The Create Service Requests screen reappears, with the profile selected in the drop-down list and the appropriate information filled in the page fields.

3.4.2.2 Editing a Service Request Profile

Follow the steps below to edit a Service Request Profile.

1. Within Oracle *i*Support, navigate to **Support** > **Create Request**.

2. In the Create Service Request screen, select the desired profile from the drop-down list. Select **Edit**.

3. Edit the profile information as you wish. See Creating a Service Requests Profile for details about the fields in this screen.

4. Select **Save**. The Create Service Requests screen reappears, with the profile selected in the drop-down list and the appropriate information filled in the page fields.

3.4.2.3 Deleting a Service Request Profile

Follow the steps below to delete a Service Request Profile.

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

3.4.3 Using Service Request Saved Views

Oracle *i*Support allows you to create customized views of your service request activity. When setting up the view(s), you select criteria you wish to include in the view -- For example you can set up views to display all of your service requests from a certain time period or for a certain product. You can create as many views as you wish. This topic group contains:

- Creating a Service Request Saved View
- Editing a Service Request Saved View
- Deleting a Service Request Saved View

3.4.3.1 Creating a Service Request Saved View

Use the procedure below to create a Service Request Saved View.

Steps

1. Within Oracle *i*Support, navigate to **Account** > **Service Requests** or **Support** > **View/Update Requests**. The View Service Requests screen displays.
2. Select **Create View**. The Create Service Request View screen displays.
3. Choose values for the following:
   - **View Name -** Enter a name for the view in the View Name textbox.
   - **Rows per Page -** Enter a value for the number of rows to display in the view.

- **Default View -** Select Default View to make this view the default that displays. The default view will be the view that displays on the Homepage. This is useful if you have more than one view set up.

4. In the Filters area, enter values that will determine which information will display in the bin.

   - **Service Request Number -** Enter a specific Service Request number if you wish the view to display information about a specific request.
   - **Project Number -** Enter a specific Project Number number if you wish the view to display information only from a specific project.
   - **Help Desk Number -** Enter a specific Help Desk Number number if you wish the view to display information only from a specific help desk number.
   - **Date Created -** Select the date range within which the requests you wish to display were created.
   - **Last Update Date -** Select the date range that the requests you wish to display were last updated.
   - **Account Number -** Select the appropriate account number. Or, leave set to All to capture information from all accounts associated with this user. This account number is the account number for the user in the Trading Community Architecture.
   - **Request Type -** Select All or a reduction criteria of the request type used when the request(s) was created.
   - **Status -** Select All or a reduction criteria of the status of the request(s).
   - **Urgency -** Select All or a reduction criteria of the urgency of the request(s).
   - **Product -** Enter product information if you wish to associate a product with the view. You can either choose from all serviceable products in Inventory, or only the products in the Install Base.

Guidelines for Product Searching:

- To search from all products in Inventory, deactivate the Select from products I own checkbox and click the flashlight icon. A List of Values will display from which you can select the appropriate product.
- To search from all products in your install base, activate the Select from products I own checkbox and click the flashlight icon. A List of Values will display from which you can select the appropriate product.

- Use the Category field to search by category.

  For more information on the install base, see Adding Products to Install Base.

5. In the Display Options area, select the data you wish to display by moving it from the left column to the right column (>). Sort the selected data if desired by using the up and down arrow buttons.
6. In the Sort Options area, you can select three different sort criteria to order the Display Options you selected in the previous step. The top choice, Sorted By, will take precedence over the other two, and the second choice, Then By, will take precedence over the bottom choice. Selecting Ascending will sort the data by first to last (whether alphabetic or numeric), and Descending will sort the data by last to first.
7. Select **Save View**. The View Service Requests screen displays with the Saved View displayed.

3.4.3.2 Editing a Service Request Saved View

Use the procedure below to edit a Service Request Saved View.

1. Within Oracle *i*Support, navigate to **Account** > **Service Requests** or **Support** > **View/Update Requests**. The View Service Requests screen displays.
2. Select a view to edit from the drop-down list. Select **Edit View**.
3. Choose values for the following, as appropriate:
   - **View Name -** Change the name of the view in the View Name textbox.
   - **Rows per Page -** Change the number of rows to display in the view.
   - **Default View -** Change whether this is the Default View that displays.
4. In the Filters area, you can change the following:
   - **Service Request Number -** Enter a specific Service Request number if you wish the view to display information about a specific request.
   - **Project Number -** Enter a specific Project Number number if you wish the view to display information only from a specific project.
   - **Help Desk Number -** Enter a specific Help Desk Number number if you wish the view to display information only from a specific help desk number.
   - **Date Created -** Select the date range within which the requests you wish to display were created.

- **Last Update Date -** Select the date range that the requests you wish to display were last updated.
- **Account Number -** Select the appropriate account number. Or, leave set to All to capture all accounts associated with this user. This account number is the account number for the user in the Trading Community Architecture.
- **Request Type -** Select All or a reduction criteria of the request type used when the request(s) was created.
- **Status -** Select All or a reduction criteria of the status of the request(s).
- **Urgency -** Select All or a reduction criteria of the urgency of the request(s).
- **Product -** Enter product information if you wish to associate a product with the view. You can either choose from all serviceable products in Inventory, or only the products in the Install Base.

Guidelines for Product Searching:

- To search from all products in Inventory, deactivate the Select from products I own checkbox and click the flashlight icon. A List of Values will display from which you can select the appropriate product.
- To search from all products in your install base, activate the Select from products I own checkbox and click the flashlight icon. A List of Values will display from which you can select the appropriate product.
- Use the Category field to search by category.

For more information on the install base, see Adding Products to Install Base.

5. In the Display Options area, select the data you wish to display by moving it from the left column to the right column (>). Sort the selected data if desired by using the up and down arrow buttons.
6. In the Sort Options area, you can select three different sort criteria to order the Display Options you selected in the previous step. The top choice, Sorted By, will take precedence over the other two, and the second choice, Then By, will take precedence over the bottom choice. Selecting Ascending will sort the data by first to last (whether alphabetic or numeric), and Descending will sort the data by last to first.
7. Select **Save View**. The View Service Requests screen displays with the Saved View displayed.

3.4.3.3 Deleting a Service Request Saved View

Use the procedure below to delete a Service Request Saved View.

1. Within Oracle *i*Support, navigate to **Account** > **Service Requests** or **Support** > **View/Update Requests**. The View Service Requests screen displays.
2. Select a view to delete from the drop-down list.
3. Select **Edit View**. The Create Service Request View screen displays.
4. Select **Delete View**.

3.4.4 Changing Service Request Status

This topic group provides instructions for changing that status of a service request that you have submitted. Topics include:

- Closing Service Requests
- Re-opening Closed Service Requests
- Adding Notes to Service Requests
- Escalating Service Requests
-

> **Note:** Depending upon the version of the Oracle *i*Support application you are using, you may or may not be able to perform all of the actions described here.

3.4.4.1 Closing Service Requests

Follow the steps below to close a Service Request.

1. Within Oracle *i*Support, navigate to **Account** > **Service Request** or **Support** > **View/Update Requests**. The View Service Requests screen displays.
2. Select the underlined **Service Request Number**. The Service Request Detail screen displays.
3. From the Status drop-list, select a value that means closed.
4. Select **Update** to save the changes.
5. Respond to any confirmation message that displays, if appropriate.

3.4.4.2 Re-opening a Closed Service Request

The time limit within which a service request can be re-opened is set by the application administrator.

Follow the steps below to re-open a service request.

1. Within Oracle *i*Support, navigate to **Account** > **Service Request** or **Support** > **View/Update Requests**. The View Service Requests screen displays.
2. Select the underlined **Service Request Number** of the closed service request. The Service Request Detail screen displays.
3. In the Status drop-down list, select a status that means re-open.

   Note: Generally, there is a time limit during which you can re-open a service request. This time limit depend upon the application configuration.
4. Select **Update**. The screen refreshes with the new status displayed.

3.4.4.3 Adding Notes to a Service Request

Follow the steps below to add a note to a service request.

1. Within Oracle *i*Support, navigate to **Support** > **View/Update Requests**. The View Service Requests screen displays.
2. Select the underlined **Service Request Number**. The Service Request Detail screen displays.
3. In the Service Request Log area, select a Note Type from the drop-down list.
4. Enter comments in the Latest Reply textbox.
5. Select **Update**.

3.4.4.4 Escalating Service Requests

Use the following procedure to escalate a service request. The service request you are escalating must be in an open state.

1. Within Oracle *i*Support, navigate to **Support** > **View/Update Requests**. The View Service Requests screen displays.
2. Select the underlined Service Request Number. The Service Request Detail screen displays.
3. In the Service Request Log area, select the **Request Escalation** button. The Escalate Service Request screen displays.

4. Select a new Urgency from the drop-down list.
5. Select a Note Type from the drop-down list.
6. Enter comments in the Justification for Escalation textbox.
7. Optionally, add attachments to the service request.
8. Select **Confirm**.

3.4.5 Searching Service Requests

Oracle *i*Support allows you to search for service requests. Use the following procedure.

Steps

1. Within Oracle *i*Support, navigate to **Support** > **View/Update Requests** > Search. The Search Service Requests screen displays.
2. Enter values for any or all of the following:
   - **Service Request Number -** Enter a specific service request number if you wish the search results to display information about a specific request.
   - **Project Number -** Enter a specific Project Number number if you wish the search results to display information only from a specific project.
   - **Help Desk Number -** Enter a specific Help Desk Number number if you wish the search results to display information only from a specific help desk number.
   - **Date Created -** Select a date range within which the requests you wish to display in the search results were created.
   - **Last Update Date -** Select a date range for the last update date to include in the search results.
   - **Account Number -** Select the appropriate account number. Or, leave set to All to capture all accounts associated with this user. This account number is the account number for the user in the Trading Community Architecture.
   - **Request Type -** Select All or a reduction criteria of the request type used when the request(s) was created.
   - **Status -** Select All or a reduction criteria of the status of the request(s).
   - **Urgency -** Select All or a reduction criteria of the urgency of the request(s).

- **Product -** Select a product for which requests have been created.

3. In the Display Options area, select the data you wish to display in the search results by moving it from the left column to the right column (>). Sort the selected data by using the up and down arrow buttons.
4. In the Sort Options area, you can select three different sort criteria to order the Display Options you selected in the previous step. The top choice, Sorted By, will take precedence over the other two, and the second choice, Then By, will take precedence over the bottom choice. Selecting Ascending will sort the data by first to last (whether alphabetic or numeric), and Descending will sort the data by last to first.
5. Select **Search**. The View Service Requests screen displays with the search results displayed in table format.

3.5 Using Accounts

This topic group provides information on how to access to account information, such as orders, invoices, payments, contracts, and shipments. For information on Returns, see Using Returns.

Topics include:

- Viewing Orders
- Viewing Invoices
- Viewing Payments
- Viewing Contracts

3.5.1 Viewing Orders

Follow the steps below to access a list of your orders and related information.

1. Within Oracle *i*Support, navigate to **Account** > **Orders**. A list of orders displays on the Order Status page.
2. Select the **Order Number** hyperlink to see additional details about a particular order.
3. Optionally, select **Details** in the Shipments column to view shipment details.

3.5.1.1 Searching Orders

Use the following procedure to search for orders.

1. Within Oracle *i*Support, navigate to **Account** > **Orders**. A list of orders displays.
2. Select the appropriate number from the Account Number drop-down list.
3. In the Search drop-down list, select a search criteria, for example, *order number*.
4. In the constraint operator drop-down list, select a criteria, for example, *greater than*.
5. In the textbox, enter search information that corresponds to the search criteria chosen in the drop-down list.
6. Select **Go** to perform the search.

3.5.2 Viewing Invoices

Follow the steps below to access a list of your invoices and related information.

1. Within Oracle *i*Support, navigate to **Account** > **Invoices**. A list of invoices displays.
2. Select the Invoice Number hyperlink to see the Invoice Details screen.
3. Optionally, select Details in the Shipments column to view shipment details.

3.5.2.1 Searching Invoices

To search for invoices:

1. Within Oracle *i*Support, navigate to **Account** > **Invoices**. A list of invoices displays.
2. Select the appropriate number from the Account Number drop-down list.
3. In the Search drop-down list, select a search criteria, for example, *invoice number*.
4. In the constraint operator drop-down list, select a criteria, for example, *greater than*.
5. In the textbox, enter search information that corresponds to the search criteria chosen in the drop-down list.
6. Select **Go** to perform the search.

3.5.3 Viewing Payments

Follow the steps below to access a list of your payments and related information.

1. Within Oracle *i*Support, navigate to **Account** > **Payments**. A list of payments displays.
2. Select the Payment Number hyperlink to view the Payment Details screen.
3. Optionally, select Details in the Shipments column to view shipment details.

3.5.3.1 Searching Payments

To search for payments:

1. Within Oracle *i*Support, navigate to **Account** > **Payments**. A list of payments displays.
2. Select the appropriate number from the Account Number drop-down list.
3. In the Search drop-down list, select a search criteria, for example, *payment number.*
4. In the constraint operator drop-down list, select a criteria, for example, *greater than*.
5. In the textbox, enter search information that corresponds to the search criteria chosen in the drop-down list.
6. Select **Go** to perform the search.

3.5.4 Viewing Contracts

Follow the procedure below to access your contracts information.

1. Within Oracle *i*Support, navigate to Account > Contracts. A list of contracts displays.
2. Click on the Contract Number hyperlink to view Contract Detail page.
3.

3.6 Using Returns

Oracle *i*Support allows you to create Return Material Authorizations (RMAs), or Returns. In order for you to create a return for an item, an order first must have been booked in Oracle Order Management. For more information, see:

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

See Creating Returns.

3.6.1 Creating Returns

Follow the procedure below to create a Return.

Prerequisite

An order has been booked in Oracle Order Management.

Steps

1. Within Oracle *i*Support, navigate to **Account** > **Returns** > **Create Returns** link.
2. In the Account Number LOV, select the account number associated with the order.
3. Enter an order number in the Order Number textbox and click **Go**. The order line items for this order are displayed.
4. Activate the checkbox next to the appropriate item.
5. Select **Create Return**. A confirmation message is displayed.

3.7 Using Install Base

Oracle Install Base is a repository of product information, location, status, party relationships, configuration, ownership, accounts, and change history for a customer product, an asset, or a software license. It offers life-cycle tracking of an item from the time that it is received, in inventory, in WIP, in projects, at customer sites, or during repair. Install Base also records a history of changes to tracked items and does so independently of their ownership, physical location, or accounting classification.

Definition: An instance in Install Base is an occurrence of an item entity. For example, an manufacturer has a part number for a TV he makes, each time he sells one TV, an occurrence of this part number is recorded in Install Base.

Install Base is specifically designed to track serialized and non-serialized item instances for the following:

- Tangible products
- Tangible assets
- Software

- Communications and utility services

All Install Base functionality in Oracle *i*Support is contained on the Products tab in the general user UI.

Oracle *i*Support allows you to view and search the install base, as well as add products to the install base. This topic area includes:

- Viewing Install Base
- Editing a Product in Install Base
- Adding Products to Install Base
- Using Saved Searches
- Defining Saved Search Criteria

3.7.0.1 Viewing Install Base

Follow the procedure below to view product information in the install base.

1. Within Oracle *i*Support, navigate to **Products** > **Summary**.
2. A list of products in the install base will display.
3. To view details of a product, select the appropriate hyperlink of the product.

For more information, please see the *Oracle Install Base Concepts and Procedures*.

3.7.0.2 Editing a Product in Install Base

1. Within Oracle *i*Support, navigate to **Products** > **Summary**.
2. In the Summary page, a list of products in your install base will display. Select the appropriate hyperlink in the Product Description column.
3. In the Product Details page, make changes as desired. See Adding Products to the Install Base for more information on the fields on the Product Details page.
4. Select **Save**.
5. Respond to the confirmation message.

For more information, please see the *Oracle Install Base Concepts and Procedures*.

3.7.0.3 Adding Products to Install Base

In the Create Product page you can create a product, or item instance. The page has regions for general item information, owner information, current location, item flags, and item views.

Use the following procedure to create a product.

Prerequisites

The item and item number for an item instance (product) must already be defined in the Inventory Item Master as IB trackable.

Steps

1. Within Oracle *i*Support, navigate to **Products**.
2. Select **Create**. The Create Product page appears.
3. In each region, enter data in the fields. Fields marked with an asterisk (*) are required.

   Note: Many fields within this page are followed by a Go button. The button indicates that you can enter a generic search value using % in the associated fields and then click Go to display a list of values that satisfy the generic criteria. When you select one of these results, it populates the associated field.

   Click the calendar icon to help you enter dates.

   Under Item Flags, *sellable* means orderable and reflects selecting the Orderable flag in the item master setup. The Merchant flag is automatically selected if an agent creates or changes the instance. The Customer flag is automatically selected if a customer creates or changes the instance.

   As necessary, click Clear to clear out your test entries, and re-enter your values.
4. If your definition is complete, optionally select **Creation Completed**.

   Doing so means that it can be used for configuration and other applications.
5. Click **Submit**.

   The Product Details page appears for your product with its new product (instance) number. If you provided values for all the required fields (with asterisks) but did not select Creation Completed, then the application selects it for you. If an instance is created without the mandatory fields, then Creation Completed is not selected. This means that the instance cannot be used in applications such as Service Request.

6. Select **Submit** to save changes.

For more information, please see the *Oracle Install Base Concepts and Procedures*.

3.7.0.4 Using Saved Searches

Oracle *i*Support allows you to save searches in the Install Base. Use the following procedure to search for products in the Install Base.With saved searches you can easily reuse a set of possibly complicated search criteria by assigning a name to the saved set of criteria. Use this procedure to display the results of a previously named set of search criteria.

1. Within Oracle *i*Support, navigate to **Products** > **Summary**. The Summary page displays a list of products in your install base.
2. In the Saved Searches LOV, select the name of the predefined search that you want to use. See Defining Saved Search Criteria for more information on how to set up a saved search.
3. Click **Go**. The search results appear in the lower part of the page.
4. As desired, click the link for an item description to display details about it.

For more information, please see the *Oracle Install Base Concepts and Procedures*.

3.7.0.5 Defining Saved Search Criteria

With saved searches you can easily reuse a set of possibly complicated search criteria by assigning a name to the saved set of criteria. Most of this defining process occurs on the Advanced Product Search page. This page is organized by regions of basic categories under which you can define and test various specific search criteria. After you are satisfied with intermediate or final results of your tests, then you can save the set of criteria with a name of your choice. The basic category regions are:

- General Attributes
- Current Location
- Party
- Contact
- Party Accounts
- Table Personalization (defines the position of displayed columns)

Most fields within the regions are followed by a Go button. The button indicates that you can enter a generic search value using % in the associated fields and then click Go to display a list of values that satisfy the generic criteria. When you select one of these results, it populates the associated field.

Use this procedure to define a named set of search criteria.

Steps

1. Within Oracle *i*Support, navigate to **Products** > **Summary**. The Summary page displays a list of products in your install base.
2. Click **Personalize**. The Advanced Product Search page appears.
3. In each basic category region, enter data in the fields.

   As necessary, use generic entries and the associated Go button to populate fields with specific values.

   Click the calendar icon to help you enter dates.

   As necessary, click Clear to clear out your test entries, and re-enter values.
4. In the Table Personalization region, use the Move and Remove commands and arrows to move selected columns between the list of available columns and columns that you select for display.
5. Use the arrows in the right-hand column of the personalization table to arrange the display sequence of your selected columns. The column titles as arranged from top to bottom are displayed from left to right on the Search My Products page.
6. As appropriate click one of the following:

   Search: Finds values that satisfy the current search criteria

   Enter a name before selecting one of these two options:

   Save: Saves the search criteria under the most recently used name for search criteria

   Save and Search: Saves the search criteria under the most recently used name for search criteria and then performs a search that uses those criteria

3.8 Using Forums

Forums in Oracle *i*Support provide a convenient, searchable, online method for sharing information with other users. This topic area includes:

- Viewing Categories

- Viewing Forums
- Posting New Messages to Forums
- Replying to Forum Messages
- Subscribing to Forums
- Setting Forums Signature
- Searching within Forums

3.8.1 Viewing Categories

Forums are organized into larger groups called categories. Follow the steps below to view category listings.

Steps

1. Within Oracle *i*Support, navigate to the Forum tab. The Category Listing window displays.
2. Use the View By drop-down list box to display either a list of categories containing Forums that you have subscribed to, or a list of all categories.

   See Subscribing to Forums for more information on this subject.
3. Categories containing forums show a plus sign (+) in the adjacent column. To expand the category listing and show the available forums, click the plus-sign next to the category name.

   Optionally, select **Expand All** to display all forums within all listed categories.

   Optionally, select **Collapse All** to display only the category names.

   See Viewing Forums for information on viewing the list of forums.

3.8.2 Viewing Forums

Follow the steps below to view a forum.

1. Within Oracle *i*Support, navigate to the **Forum** tab. The Category Listing window displays.
2. Categories containing forums show a plus sign (+) in the adjacent column. To expand the category listing and show the available subcategories, click the plus-sign next to the category name.

   Optionally, select **Expand All** to display all forums within all listed categories.

Optionally, select **Collapse All** to display only the category names.

3. The name of active forums will display as underlined links. Click a link to enter a forum.

   See Posting New Messages to Forums and Replying to Forum Messages for information on posting and replying to messages.

3.8.3 Posting New Messages to Forums

Follow the steps below to post a new message to a forum.

1. Within Oracle *i*Support, navigate to the **Forum** tab. The Category Listing window displays.
2. In the category list, categories containing forums show a plus sign (+) in the adjacent column. To expand the category listing and show the available forums, click the plus-sign next to the category name.
3. Forums names will appear as hyperlinks. Click a link to enter a forum.
4. Click **New Thread**.
5. Fill in the Subject name and type your message.
6. Click **Post**. Your message will be stored underneath the forum.

   Note: Any information you have entered in the User Signature textbox in the General Preferences area will display when you post to Forums (see Setting Forums Signature).

3.8.4 Replying to Forum Messages

Follow the steps below to reply to a message within a forum.

1. Within Oracle *i*Support, navigate to the **Forum** tab. The Category Listing window displays.
2. In the category list, categories containing forums show a plus sign (+) in the adjacent column. To expand the category listing and show the available forums, click the plus-sign next to the category name.
3. Forum names will appear as hyperlinks. Click a link to enter a forum.
4. Messages will display as hyperlinks. Select a message to view it.
5. In the Message Content screen, select **Reply**. To have your message display at the root level of the forum, click **New Thread**.

6. In the Post Forum Message screen, enter the Subject name and type your message.
7. Click **Post**.

Note: Any information you have entered in the User Signature textbox in the General Preferences area will display when you post to Forums (see Setting Forums Signature).

3.8.5 Subscribing to Forums

Oracle *i*Support gives you the option of listing on your forums page a set group of forums, presumably the ones you access most often and/or are most interested. This functionality is known as Subscribing to a Forum. Directions for enabling this feature are shown below.

Steps

1. Within Oracle *i*Support, navigate to the **Forum** tab.
2. Enter a forum using the procedure detailed in Viewing Forums.
3. Select **Subscribe**. When you access the main Forums page, you will have the option displaying only the forums to which you have subscribed

3.8.5.1 Unsubscribing to Forums

Use the following procedure to unsubscribe to Forums you have subscribed to.

1. Within Oracle *i*Support, navigate to the **Forum** tab.
2. Enter a forum using the procedure detailed in Viewing Forums.
3. Select **Unsubscribe**.

3.8.6 Setting Forums Signature

Use the following procedure to set the signature that will display when you post messages to forums.

1. Within Oracle *i*Support, navigate to the **Profile** button at the top of the screen. The Personal Profile page.
2. From the Personal Profile page, select the **Support** link.
3. In the User Signature textbox, enter the desired information.
4. Select **Update** to save changes.

3.8.7 Searching within Forums

Follow the guidelines below to use the forums search function.

1. Within Oracle *i*Support, navigate to the **Forum** > **Advanced Search**.
2. Enter data in any one or all of the following fields:
   - **Message Number -** This is the system-generated message number.
   - **Subject Keyword(s) -** Enter (case insensitive) keywords that may be in the message headers (subject) of the appropriate messages. You can enter more than one word in this field, using the % sign as a wildcard, but your **search criteria must match the exact order of the wording** found in the subject field.
   - **Example:** You are having a problem closing your CD-ROM tray and wish to search for messages that relate to this subject. In this example, there is a message with the subject, *Unable to close CD-ROM* tray. If you enter `unable%CD` in the search field, it will find the message. But, if you enter `CD%unable`, the system will not find the message.
   - **Message Keyword(s) -** Enter (case-insensitive) keywords that may be in the bodies of applicable messages. You can enter as many words as you like, and there is no need to use a plus sign (+) here, although you can use it you like. Also, the words do not need to be in any particular order.
   - **Category -** Leave the drop-down list set to All to search all categories, or restrict the search to a particular category by choosing the category from the list.
   - **Forum -** Leave the drop-down list set to All to search all forums, or restrict the search to a particular forum by choosing the forum from the list.
   - **Posted Between -** Use the calendar icon to the right of the first textbox to select a date to begin searching from, and use the calendar icon to the right of the second textbox to select an end date.
   - **Author -** Select the Myself radio button to find messages posted by you. To find messages written by others, select the Others radio button and enter the name of the author of the message. Use the format <first name> <space> <last name>.
   - **Message Status -** Choose from the radio buttons: **Read** will only search messages that have been viewed by a user. **Unread** will only search messages that have not been viewed by a user. **All** will search both types.

3. Select **Search**. The application will return a list of messages matching your search criteria. If no messages are found, the system will return the message, *No messages were found to match the search criteria*.

3.8.7.1 Forum Search Results

Forum search results are organized into a table with the following columns:

- **Subject Name -** Message header or subject.
- **Author -** Name of the person who posted the message.
- **Date -** Date the message was posted.

To view a message, click on the appropriate hyperlink in the Subject Name column. You will then be able to reply to the message or start a new message thread within the forum.

To begin a new search, select the **Search Again** button and follow the steps above in Searching Forums.

3.9 Requesting a Support Call Back

Oracle *i*Support allows users to submit a call-back request from Support agents. Use the following procedure to request a Support call-back:

1. Within Oracle *i*Support, navigate to **Support** > **Call Me**.
2. Enter the required information in the text fields.
3. Select **Submit**.

3.10 Responding to Surveys

Oracle *i*Support allows application administrators to survey users on various issues. Use the following procedure to respond to a Survey.

1. Within Oracle *i*Support, navigate to **Support** > **Survey**.
2. Select the hyperlink of the appropriate survey.
3. Enter the required information in the text fields.
4. Select **Submit**.

3.11 Changing User Profile Information

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

- Changing/Resetting Password
- Adding/Changing Contact Points (Phone/Email/Fax)
- Adding/Changing Address Information
- Setting General Preferences
- Changing Default Responsibility
- Changing Default Customer Account

3.11.1 Changing/Resetting Password

Follow the steps below to change or reset a password.

1. Within Oracle *i*Support, navigate to the **Profile** button at the top of the screen. The Personal Profile page displays.

   Note: If you are an administrator performing this task, search for the user and then select the underlined hyperlink of the username to access the Personal Profile page for that user.

2. In the Personal Profile page, enter the new password in the New Password and Re-enter New Password fields.
3. Click **Update** to save the changes.

3.11.2 Adding to or Changing Contact Points (Phone/Email/Fax)

Add to or change contact points of users (such as phone, email, fax) by following the steps below.

Steps

1. Within Oracle *i*Support, navigate to the **Profile** button at the top of the screen. The Personal Profile page displays.

   Note: If you are an administrator performing this task, search for the user and then select the underlined hyperlink of the username to access the Personal Profile page for that user.

2. From the Personal Profile page, select the **Contact Points** hyperlink.

To edit an existing contact point, select the underlined hyperlink of the appropriate contact point.

To create a new contact point, select **Create**.

3. Make additions/alterations to the following:
   - **Communication Type -** Enter the type of communication; examples are email, phone, telex.
   - **Phone Line Type -** If you have selected Phone as the Communication Type, select the type of phone line from the drop-down list. Examples are fax, general, home, mobile.
   - **Phone Country Code -** Select the appropriate country code from the list.
   - **Phone Area Code -** Enter phone area code. Use only numerical values in this field. Do not use parentheses or hyphens, for example.
   - **Phone Number -** Enter the phone number, without the area code. You may use hyphens (-) or periods (.) to separate the numbers if you wish.
   - **Primary Contact** checkbox **-** If this is to be the preferred method of contact, activate this box. Checking this box will override any primary checkbox setting for an identical Communication Type. For example, if you had previously checked this box on another phone number, when you check this box for a different phone number, that second Primary Contact selection will override the first phone number as Primary Contact.
4. When finished making changes, select **Save**.

3.11.3 Changing Address Information

Follow the steps below to change address information for a user.

Steps

1. Within Oracle *i*Support, navigate to the **Profile** button at the top of the screen. The Personal Profile page displays.

   Note: If you are an administrator performing this task, search for the user and then select the underlined hyperlink of the username to access the Personal Profile page for that user.
2. From the Personal Profile page, click the **Addresses** link.

   To edit an existing address, select the underlined hyperlink of the address.

To create a new address, select **Create**.

3. Make desired changes to the following:
   - **Address Type -** Select the type of address, such as Bill to, Ship to, etc.
   - **Address 1 -** This is the first line of the address that would appear on an envelope or mailing label.
   - **Address 2 -** This is the second line of the address that would appear on an envelope or mailing label.
   - **City -** Enter the appropriate city.
   - **State -** Enter the appropriate state.
   - **Postal Code -** Enter the appropriate postal code.
   - **Country -** From the drop list, select the appropriate country.
   - **Primary Address** checkbox **-** Select this box if this is the preferred address to use for this user.

   Note: There can be a primary address for each address type, e.g., there can be a primary bill to and a primary ship to address.

   ---

4. Save the changes by selecting **Save**.

3.11.4 Setting General Preferences

General preferences include default style sheet, language, currency, and date format.

Follow the steps below to change general preferences.

1. Within Oracle *i*Support, navigate to the **Profile** button at the top of the screen. The Personal Profile page displays.
2. Select the **Preferences** hyperlink. The General Preferences page displays.

   For instructions on how to change current and default responsibilities, see the Changing Default Responsibility topic.
3. In the General Display area, set the following as desired:
   - **Display Style -** Select a default style sheet.

- **Language -** Select a default language.
- **User Currency -** Select a default currency.
- **Date Format -** Select a date format to use when entering dates.

  RRRR = year

  DD = day

  MM or MON = month

4. In the Table Display area, set the following as desired:
   - **Display Rows per Page -** Select the number of rows to display of any tables that are displayed within the application.
   - **Display Blank Rows per Table -** Select the number of blank rows to display in any updateable tables that are used by the application.
5. Select **Update** to save changes.

3.11.5 Changing Default Responsibility

Responsibilities define application privileges, controlling the presentation of menus, tabs, and screens. For more information, see Understanding User Management.

Steps

1. Within Oracle *i*Support, navigate to the **Profile** button at the top of the screen.
2. Select the **Preferences** hyperlink. The General Preferences page displays.
3. **To change current responsibility:** In the Responsibility Management area, select the desired Current Responsibility. The page will refresh with the current responsibility reflected in the UI screens.
4. **To change default responsibility:** Select a Default Responsibility from the drop-down list. The value chosen here will be reflected the next time login occurs.
5. Select **Update** to save changes.

3.11.6 Changing Default Customer Account

Use the following procedure to change the default account number that displays on some of the application pages.

1. Within Oracle *i*Support, navigate to the **Profile** button at the top of the screen. The Personal Profile page displays.

   Administrator Note: If you are an administrator performing this task, search for the user and then select the underlined hyperlink of the username to access the Personal Profile page for that user.

2. Select the **Accounts** hyperlink. The Accounts page displays.
3. Select the radio button next to the desired account.
4. Save the changes by selecting **Save**.

3.12 Using Knowledge Management

See the *Using Oracle Knowledge Management* chapter or topic group. Knowledge Management documentation has been bundled with the Oracle *i*Support documentation for the 11.5.6 release.

4

Understanding Oracle Knowledge Management

This topic group provides an overview of Oracle Knowledge Management (KM), including key concepts, features, functionality, and KM relationships to other Oracle or third-party applications.

4.1 What is Knowledge Management?

Knowledge management is the process by which knowledge is identified, accessed, enhanced, and protected through the use of advanced technology, user friendly portals, and the development of a culture of openness, sharing, and collaboration.

Knowledge becomes an asset for an organization only when it is available in an ordered and accessible format for use by its employees and customers. Knowledge can exist in different structured formats such as databases, white papers, presentations, etc.

Knowledge management is designed to prevent duplication of effort, and poor decision making due lack of quality information. Knowledge management is also designed to improve communication, reduce costs, and to develop competitive advantage.

More than eighty percent of incoming customer assistance requests to service centers involve issues that have already been resolved. If a knowledge management system is not available, a frequently-posed question has to be repeatedly researched and relayed by the agent. In this scenario, several costs, both real and in terms of customer satisfaction, are incurred. Real costs are associated with the life cycle of the problem: customer service representatives must answer the initial customer call, log the problem, request more information, escalate the problem, deal with bugs, find out if a solution already exists, communicate the fix back to the customer, and close the problem. Intangible costs are associated with low customer and agent satisfaction.

A good knowledge management system helps build strong customer relationships by enhancing the customer experience with a company's product or service. A knowledge management module is an important part of any complete customer support application. It allows customer support representatives to match the problem that they face with the problems that have been previously experienced and recorded. Reuse of existing problem descriptions and solutions, improves customer service efficiency.

4.2 Overview of Oracle Knowledge Management

Oracle Knowledge Management is a comprehensive information management system for managing 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.

Oracle Knowledge Management 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, and gaining an edge over competitors

4.3 Overview of Oracle Knowledge Management Functionality

Oracle Knowledge Management has the following features:

4.3.0.1 Solution Authoring Features

Solution authoring functionality includes the ability to check solutions in and out, allowing only one internal user to edit a solution and/or statement at one time. This serves as a source control measure. Other features include the ability to display a solution to specific user groups, merge statements to create a new solution, and collaborate in authoring new solutions.

4.3.0.2 Categorization of Solutions

This allows the segregation of solutions in categories or folders for browsing or for performing a category specific search for solutions.

4.3.0.3 Finding Matching Statements/Solutions

While creating a statement, you can find matching statements or solutions in the database to prevent duplication.

4.3.0.4 Finding Related Statements/Solutions

You can reuse statements in more than one solution. Finding related solutions/statements is the process of following the statement's reused links to locate other related solutions/statements. These linked solutions are displayed based on the number of times they have been used to solve an issue.

4.3.0.5 Product, Platform, or Category Specific Search of Solutions

To narrow search results, you can search for solutions under different products, platforms, or categories.

4.3.0.6 Adding Attachments, External Links, and/or Comments to Solutions

This allows users to add supporting and related information, links, or comments to a solution to enhance its usefulness.

4.3.0.7 Multiple Search Methods

You can select from multiple search methods available in Oracle Knowledge Management.

The search methods include intermedia text (see below), or keyword searches. A query can consist of a single or multiple search terms, the latter separated by spaces.

Oracle Knowledge Management uses InterMedia Text 8.1.7 for text searching. InterMedia Text (iMT) provides integrated management of free text stored in the database, on websites, or on file systems. For more information about InterMedia, navigate to either http://www.oracle.com/intermedia/ or http://otn.oracle.com/products/intermedia/index.htm

4.3.0.8 User Defined Search Result Order

The user can define the way the search results for solutions will be displayed in the results list.

4.3.0.9 Creating and Searching by Multiple Solution Types

Information in Oracle Knowledge Management is organized into solutions, segmented into solution types. You can create multiple solution types and search by either symptom / cause / action (default) solution type or any custom solution type, such as problem / resolution, that you create.

4.3.0.10 Solution Scoring

Each solution is scored based on the text match performed by InterMedia Text and the number of times it has been successfully used to solve issues. These scores are shown as a combined score to indicate the strength of the match to the query entered. The maximum score is 100.

4.3.0.11 Integration with Oracle Workflow

Oracle Workflow integration provides a workflow process to Oracle Knowledge Management to manage the solution approval and rejection process. It is a flexible method for Oracle Knowledge Management users to define solution processing steps that are specific to their needs.

4.4 Oracle Knowledge Management and Other Oracle Applications

Oracle Knowledge Management is an integrated solution support tool for service organizations. It integrates with other Oracle Service modules such as Oracle Quality Online, Oracle Field Service, and Oracle Depot Repair. This integration provides service agents for these modules easy access to solutions.

Oracle Knowledge Management also integrates with Oracle *i*Support and Oracle eMail Center. It enables customers of these modules to resolve their own service issues if possible.

4.4.1 Oracle *i*Support

Oracle *i*Support uses Oracle Knowledge Management to search for published solutions. You can also create new solution types and statement types. A service request agent can search the knowledge base for solutions while creating a service request. Oracle *i*Support customers can also search the knowledge base to find solutions without waiting for a service agent's assistance.

4.4.2 Oracle Service Applications

Oracle Service Applications use Oracle Knowledge Management to search for published solutions. As new service requests are entered, service agents may search Oracle Knowledge Management to identify solutions that have resolved similar problems in the past. They can then provide a solution to the customer while creating a service request. Service personnel can also create new solutions during the resolution process. See the latest version of *Oracle Service Concepts and Procedures* for more information.

4.4.3 Oracle Support

Oracle Support (also known as Oracle TeleService) is a Service Request Management System that integrates with Oracle Knowledge Management for resolving customer issues. Oracle TeleService provides an integrated solution for conducting all aspects of customer management and interaction. It provides call center agents with the tools and information required for effective customer relationship management. See the latest version of *Oracle Support Concepts and Procedures* for more information.

The integration of Oracle Support's Service Request module with Oracle Knowledge Management reflects the following process flow:

- A customer service agent receives a customer call. The agent opens a service request by entering customer information and verifying service eligibility.
- The agent notes the customer problem. While writing the problem description, the agent searches the knowledge base for similar information. If the same or similar problem exists, a solution may be available as well.
- The customer service agent initiates a search in the knowledge base for an existing solution. If one is found, it is used. If not, he can create a new solution.

4.4.4 Oracle Depot Repair

Oracle Depot Repair is designed to track and manage the repair process in a service organization. This application reduces customer downtime and helps bridge the gap while the product is being repaired.

Oracle Knowledge Management allows a technician in Oracle Depot Repair to review the full problem solution life span, starting from the initial diagnosis of a problem to problem resolution. See the latest version of *Oracle Depot Repair Concepts and Procedures* for more information.

4.4.5 Oracle eMail Center

Oracle eMail Center is a complete solution for managing inbound email interactions with customers, partners, suppliers, employees, and others that interact with an organization. Oracle eMail Center provides an agent with tools and capabilities to maximize their productivity and effectiveness. See the latest version of *Oracle eMail Center Concepts and Procedures* for more information.

Oracle Knowledge Management integrates with Oracle eMail Center during inbound email processing. Oracle Knowledge Management can be searched for appropriate responses or solutions by Oracle eMail Center agents while responding to an email. The searched solutions can be sent as an e-mail message to the customer.

4.4.6 Oracle Quality Online (OQO)

Oracle Quality Online is a comprehensive web-based application that can be used by organizations to track and manage product defects and enhancements. The resolved defects in Oracle Quality Online can be submitted to Oracle Knowledge Management as solutions. This increases the knowledge base of solutions and allows users of both modules to search for existing solutions and to prevent duplicate defect entry. See the latest version of *Oracle Quality Online Concepts and Procedures* for more information.

4.4.7 Oracle Workflow

Business processes today involve getting many types of information to many individuals. Oracle Workflow allows you to automate and continuously improve business processes by routing information of any type, according to easily changed business rules, to people both inside and outside your enterprise. See the latest version of the *Oracle Workflow Guide* for more information.

Oracle Workflow integration provides a workflow process to Oracle Knowledge Management to manage the solution approval and rejection processes. It is a flexible method for Oracle Knowledge Management users to define solution processing steps that are specific to their needs.

4.5 Understanding Solutions and Solution Types

In Oracle Knowledge Management, information is organized into solutions, segmented into solution types.

A solution is a collection of statements. These statements can either be unique to a solution or can be shared with other solutions. Any number of solutions can reside simultaneously in the knowledge base.

Each solution contains some mandatory statements and some optional statements to make it a complete solution.

A solution type can provide segmentation to the knowledge base, depending on how the information is captured and used. Organizing solutions in solution types makes searching more precise and results more effective.

A system administrator can define mandatory and optional statements for a solution type. For example, Oracle Knowledge Management is seeded with symptom / cause / action (SCA) solution type. A system administrator can also create an unlimited number of solution types for their company's specific needs.

A solution type should have a self-descriptive name and should follow the merchant's naming conventions. Examples of common solution types are:

- SCA (Symptom / Cause / Action)
- PR (Problem / Resolution)
- QA (Question / Answer)

A solution contains a title, categories, products, platforms, and links to statements, attachments, and comments. There is an optional minimum number of statements, defined by a KM Administrator, for a complete solution. The merchant sets solution viewing limitations.

4.5.0.1 Understanding Solution Usage Count

In Oracle Knowledge Management the solution usage count is updated depending on how many 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 Oracle Knowledge Management, for example, Oracle *iSupport*, the question, *Can this solution solve your problem*, appears in the UI flow. If a user selects yes, the Knowledge Base Update Used Count concurrent program runs and updates the usage count in the Oracle Knowledge Management.

When a user selects yes for the question *Can this solution solve your problem*, the solution usage count is updated and statements within a solution are updated.

4.5.0.2 Status of Solutions and Statements

Solutions and statements have a status attribute. This attribute describes the phase of review that the solution or statement has gone through. Common solution statuses are: Draft, Under Edit, Technical Review, Editorial Review, Obsolete, and Published

The status of a solution is used in the solution approval process. Each status is associated with a user group. Each group is associated with a specific responsibility. A status can be mapped to different user groups to limit visibility.

4.5.0.3 Understanding Attachments

Attachments are links from a solution to a supporting item of information that will enhance the value of the solution for users. Attachments can include graphics, scripts, and many file formats such as PDF and EXE.

Attachments are added in the Create Solution screen or Solution Detail screen. To add an attachment, a search process is provided to locate the attachment either on the web or on a user's computer. A title is added and an access path for navigating to the attachment is provided.

4.5.0.4 Understanding Solution Repositories

A solution can exist in three repositories:

1. Checked-Out Repository: A private repository for internal users that allows only one person at a time to update a solution. After updating a solution, an internal user can check in the solution for another worker/administrator to work on it.
2. Pending Assignment Repository: Contains solutions that are submitted to the workflow but have not yet been accepted by an internal user with appropriate user group and status permissions.
3. Published Repository: Contains solutions that have been approved by an internal user and have been published for use by internal and external customers.

4.6 Understanding Statements and Statement Types

A statement is a description of any aspect of a problem, its cause, or its resolution. A statement has a summary field, (limited to two kilobytes, or two thousand bytes) and a Detail field (limited to two gigabytes, or 2 billion bytes). Statements can be segmented into statement types. Statements form relationships with other statements and solutions.

Statements and solutions have a container relationship. A solution can contain any number of statements. A statement can be specific to one solution or can be shared with other solutions.

Examples of statements are:

- Computer locks up every time it is started
- Windows 95
- Run disk defragmentation program on the computer

A statement type is an identifying name associated with a particular part of the solution. It is used to categorize the statement text into distinct categories.

Examples of statements types are:

- Symptom: What the user is experiencing, e.g, *Computer locks up every time it is started.*
- Fact: Factual Information e.g, The environment in which the event occurred (Windows 95, Unix, etc.) e.g, *Windows 95*
- Cause: What has caused the issue (known or unknown), e.g, *After installing the ABC cd, I get memory errors.*
- Action: What needs to be done to resolve the issue, e.g, *Run the disk defragmentation program on the computer.*

A statement can be used in multiple solutions within the same solution type, and in different solution types. In each case, the statement will build a unique relationship with that solution.

You can create any number of statement types. You must create statements using the naming conventions that relate to the merchant's current processing steps.

4.7 Understanding Categorization of Solutions

Categorization of solutions is the process of segregating solutions into categories for browsing or for performing a category-specific search for solutions.

Oracle Knowledge Management allows manual category definition on its user interface. Both product and non-product category listings are supported. Examples of product-related categories for a particular company may be databases, software, etc. Non-product categories may include services such as support agreements, and service contracts.

Product-related categories can be obtained from the Item Master in Oracle Inventory. Item Master contains a list of products that the merchant sells or services. For more information, see the latest version of *Oracle Inventory User's Guide.*

The number of categories is defined by the merchant and may range from none to any reasonable number. Category types are also defined by the merchant.

You can select more than one category while creating or modifying a solution and while searching for a solution. Category lists can consist of anything that the merchant chooses to use for categorization purposes. For products, the category names can be taken from the Item Master and for non-product categories, you can provide your own description.

You can browse Categories and drill down by category and sub-category to narrow search results. Searching for a solution after selecting a category provides more focused results.

4.8 Overview of Oracle Knowledge Management Search Functionality

Using Oracle Knowledge Management's Advanced Search, you can perform the following kinds of searches:

4.8.0.5 Finding Matching Statements

This is a text based search performed on statements. It compares the keywords to the summary of the statements in the repository. Scores are calculated by the Intermedia Text engine and depend on the search option selected.

4.8.0.6 Finding Related Statements

This search is based on the links that the selected statements have to other statements. First, a list of statement identifiers is chosen from the selected statements in the criteria list. These are compared with a stored list of statement-to-statement relationships. Any statements that have a relationship with any of the selected statements will appear in the search results. Relationships are created between two statements whenever they are used together in the same solution. The score reflects the strength of the relationship, which is measured by how often two statements are used together in solutions.

4.8.0.7 Finding Matching Solutions

This is a text based search. The selected statement summary is compiled into a single keyword. The search is performed on solutions comparing the keyword to the solution content, which includes the solution title and the summary and descriptions of all the statements contained in the solution. Scores are determined by the Intermedia text engine.

4.8.0.8 Finding Solutions Related to Statements

This search is based on the links that the selected statements have to solutions. First, a list of statement identifiers is chosen from the selected statements in the criteria list. These statement identifiers are compared with a stored list of statement-to-solution relationships. Any solutions that have a relationship with any of the selected statements will appear in the search results. Relationships are created between a statement and a solution when the statement is used in the solution. The score reflects how many of the selected statements are contained within each solution search result. Solutions having most of the selected statements will have higher scores.

4.8.1 Multiple Text Search Options

The following text search options are available in both Basic and Advanced Search functionality:

- All Keywords: This search uses the AND operator. The search results must match all terms in the query. For example, if you enter *Oracle server* as a search query, Oracle Knowledge Management would read it as *Oracle* AND *server* and send it to Intermedia.
- Any Keywords: This search uses the OR operator. This search can match one or more query terms.
- Fuzzy Match: In this search, the query keywords are expanded into a set of similarly spelled keywords, before a search is performed. This search is helpful if there are frequent misspellings of the query keyword in the repository. The search will find incorrect spellings and synonym matches to the query terms.
- Theme: This is also called an *about search* in Intermedia. Intermedia categorizes the documents in its repository into themes, based on their textual content. When this search is performed, the query keywords are compared with the theme index. Documents having the same themes as the keywords appear in the result list. For example, if the query term is *soccer*, a document about the World Cup could be among the results. This search will determine the theme of the query and locate any references to that theme.
- Accumulate: This search will find documents that contain at least one of the query terms. The results are scored based on two criteria:
  - Document term scores: Each query keyword that appears in the result is given a score of 1 and the query keywords that don't appear in the result are given a score of 0.
  - Document term weights: Refers to the total weight that you place on each query term. For example, a query such as x, y, z may have term weights of 1 for each term. A query such as x, 3*y, z may have term weights of 1, 3, and 1 for each term in that order. The highest score is assigned to documents that have the highest total term weight.

- Boolean: In this search you can enter your own Intermedia operators. If you do not enter an operator, this search performs a phrase search. It was previously known as Intermedia Syntax search.
- Solution Number: Every solution in Oracle Knowledge Management is associated with a unique number. This search will find the solution that is associated with the number entered in the search query field.

4.8.2 Understanding Search Result Order

You can determine how the search results for solutions or statements will appear in the results list by selecting an option from the Sort by drop-down list in the Advanced Search screen. The options are:

- Score
- Type
- Number
- Last Update Date
- Summary

4.8.3 Solution and Statement Distribution Options

For access control of solutions and statements, Oracle Knowledge Management provides various distribution options. The options are internal, external, limited, and restricted. A KM administrator or a KM worker can configure these settings when creating a solution. Each user can be associated with one or more options.

- Internal Distribution: a solution can be viewed and/or distributed only within the company.
- External Distribution: a solution can be distributed both to internal and external customers.
- Limited Distribution: a solution can be distributed outside a company under specific conditions.
- Restricted Distribution: a solution can be viewed and/or distributed only among selected groups of internal users.

4.9 Understanding Workflow in Oracle Knowledge Management

Oracle Knowledge Management integration with Oracle Workflow provides a workflow process to manage the solution approval and rejection processes. It is a flexible method for Oracle Knowledge Management internal users to define solution processing steps that are specific to their needs.

Example of the Workflow Process

1. An author begins creating a solution in Create Solution screen. The solution is saved as a work-in-progress solution and has a saved status. It appears in the Work Pending screen.
2. You can continue to work on your work-in-progress solution. After completing it, click Save and Submit from the Solution Detail screen.
3. The Available Work Process screen appears. Select an appropriate workflow from the list. The solution is removed from the Work Pending screen.
4. The members of the Reviewers User Group are notified of the solution to be reviewed.
5. Any member of the Reviewers User Group can navigate to the Work Pending screen and search for the solution that is ready to be reviewed. After the solution is found, a member can click Check-Out to lock the solution. No other reviewer can work on this solution until it is back in the workflow.
6. A reviewer can review the solution, make edits, accept or reject the solution, then click Save and Submit on the Solution Detail screen to continue the workflow process. The status of the solution changes if a solution is accepted. For example, from Draft to Under Edit, or from Under Edit to Technical Review. If a solution is rejected, the reviewer can add comments, select the author's user group and click Reject. An author can check-out the solution, review comments, make required edits or changes and Save and Submit the solution to the workflow.
7. After being accepted by the Reviewers user group, a solution is sent to the Publishers user group. Any member of the Publishers user group can navigate to the Work Pending screen and search for the solution to be reviewed. After the solution is found, a member can click the Check-Out button to lock the solution. No other member of the Publishers user group can work on this solution until it is back in the workflow.
8. A publisher can review the solution, make edits, accept or reject the solution, and click Save and Submit to continue the workflow process. The status of the

solution changes to the Published status if a solution is accepted. If a solution is rejected, a publisher can add comments to the solution, select the author's user group or reviewers user group and click Reject. An author or reviewer can check-out the solution, review comments, make required edits, and Save and Submit the solution to the workflow.

4.10 Overview of MES Functionality

Oracle Marketing Encyclopedia System (MES) is the content repository module of the Customer Relationship Management (CRM) suite of applications. MES allows you to create, publish, and manage content. It also allows you to organize content in different hierarchies. The content can include any business relevant information including product pricing, competitive data, industry news, and sales presentations. This content can be in a variety of formats, including HTML, digital video, Power Point, etc. For more information, see the latest version of *Oracle Marketing Encyclopedia System Concepts and Procedures*.

You can search within MES using metadata, such as title, author, keyword, and/or date of publication. Search results include the percentage of match to entered search criteria and links to content.

The hierarchy of categories and channels allows you to store, organize, and distribute different types of content items in the MES repository. A channel is a sub category within a category. For example, in a category called Application Software, channels may be defined as Financial, Inventory, Manufacturing, etc.

A hierarchy can have unlimited levels of categories. Channels are the lowest level in the hierarchy of categories that contain published items.

MES provides the following functionality:

4.10.0.1 Content Repository

MES provides a central repository for storing and retrieving information in a variety of formats. You can view all the categories and channels of information maintained by an organization.

4.10.0.2 Role and Permission Based Access

MES includes access control features for managing the publishing process more efficiently. Security is based on group privileges and on user roles. Users can assign, update, and change access privileges depending on their roles and responsibilities. Users can also publish items based on their privilege setup and send messages to any group created in MES.

4.10.0.3 Notification, Approval and Message Capabilities

MES provides bins for holding messages, notifications, and items pending approval.

- Message bins hold broadcast messages and are useful for sharing urgent information.
- The Notification bin allows channel creators to receive notices when new content items are published to their channels.
- The Approval bin holds content that requires approval for publication to a given channel.

4.10.0.4 Keyword and Content Based Searching

MES offers search capabilities for finding specific information. Users can search for information by using metadata such as title, author, keyword, and/or the date of publication. Search results include the percentage of the result matched to the search criteria and links to content.

4.10.0.5 Other Features

- Automatically publish items to channels that match the publishing criteria, using the Matching Engine.
- API support in both Java and PL/SQL.
- My Channels screen to view the channels and categories subscribed to by the user. Users can also view their published items, notifications, messages, and items published to group channels and territories.

5

Using Oracle Knowledge Management

This topic group provides process-oriented, task-based procedures for setting up Oracle Knowledge Management (KM) and performing essential business tasks.

5.1 Searching for a Solution

All users can search for published solutions using the following search methods:

- Basic Search allows you to search for a solution based on a keyword and/or a category.
- Advanced Search is more comprehensive. You can search for solutions under different categories, products, and/or platforms.

Note: Oracle iSupport administrators can navigate to the Basic Search, Advanced Search, and other KM functionality by clicking the Solutions tab. Other iSupport users can navigate to Basic Search and Advanced Search functionality from the Support tab.

5.1.1 Basic Search

Perform a basic search if you want to find a solution using a simple keyword or to search by category. Use this procedure to search for a published solution in Oracle Knowledge Management.

Prerequisites

Administrative privileges.

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. Navigate to SMS > Search > Basic Search.
4. In the Search for field, enter known information to narrow down your search or click a category to search for a solution in that category.
5. Select a search option. The available options are: All Keywords, Accumulate, Any Keywords, Fuzzy Match, Theme, Boolean, and Solution Number. (For more information about search options, see the topic, Multiple Text Search Options.
6. Click Go. The results appear in the Solutions section.
7. Click the solution summary to navigate to the View Solution screen for viewing the solution details.

5.1.2 Advanced Search

Use Advanced Search to search for solutions under different categories, products, and/or platforms.

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 > Search > Advanced Search. Search for a Solution--Advanced screen appears.
4. You can optionally select categories, products, and/or platforms to narrow down the search criteria.
5. Select a solution type.

6. Select a search option. The available options are: All Keywords, Accumulate, Any keywords, Fuzzy Match, Theme, and Boolean. (See the topic, Multiple Text Search Options.)
7. Select a Relevancy Threshold or score to narrow the results of the entered criteria.
8. Select a Sort By field. The options are Score, Type, Number, Last Update Date, or Summary.
9. Select Ascending or Descending.
10. In the Statements section, select a statement type and enter any keywords associated with the statement type in the Description field.
11. In the Search For drop-down box, choose from the following options:
    - Matching Solutions
    - Solutions Related to Statements
    - Related Statements
    - Matching Statements
12. Click Go. The results appear in the Results sub-section. Click the Solution Description to navigate to the View Solution screen.

5.2 Searching for a Statement

Internal users can search for statements in Oracle Knowledge Management.

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 > Search > Search Statements. Search Statements screen appears.
4. In the Search Statements screen, enter some known information to narrow your search:
   - Statement Number: is the number assigned to a statement in Oracle Knowledge Management when a statement is created.

- Statement Type: is the category assigned to a statement when a statement is created.
- Summary: a word or sentence used in the summary of the statement.
- Relationship: select among the available options. The options are Don't Care, Belong to No Solution, and Belong to Some Solution.
- Sorted By: the options are, Last Updated Date, Statement Number, or Score.

5. Click Go. Search Statements Results screen appears with the results.

5.3 Creating a Solution

Solutions consist of a collection of statements.

If you have Oracle Knowledge Management integrated with Oracle Workflow, a solution must go through the solution approval process before being published. After a solution is created, it is assigned to a user (resource) group for further action, e.g, editorial review, technical review, before being published to external users.

If Oracle Knowledge Management does not have Oracle Workflow integrated, a solution passes directly from draft to published status.

Prerequisites

Internal KM users with create permissions (CS_Solution_Create) can create a solution.

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 > Solution > Create Solution. Create Solution screen appears.
4. You can optionally select one or more categories, products, and/or platforms to be associated with this solution. To add a category, product, or platform, click Add under the Related sub heading. The Corresponding screen appears. Make the required selection.

   > **Note:** You can also remove a related category, product, or platform from a solution.

5. Enter a solution title. The maximum length of a solution title can be 80 characters.
6. Select a Solution Type from the drop-down list.
7. Make a selection for the Distribution field. The options are Internal, Limited, Restricted, or External.
8. In the Statements section, create a new statement.
    1. In the Statements section, click Create New Statement. The Statement Detail screen appears.
    2. Select a Statement Type.
    3. Select a Distribution option.
    4. Enter a summary for the statement.
    5. Enter information about the statement in the Detail field.
    6. Click Save. Create solution screen appears with this statement added in the Statements section.
9. Optionally, you can search for similar or related solutions or statements.
10. To find a similar or related solution or statement, select solution or statement in the Search For drop-down-box.
11. Select the checkbox next to the statement on which you would like to do a search.
12. Click Find Similar or Find Related. The results appear in the Search Results section.
13. Optionally, you can add external links or attachments to the solution. To add an attachment, perform the following steps:
    1. On the Attachments section, click Add.
    2. A pop-up screen appears. Click Browse to search for a file to be added as an attachment.
    3. Click Attach. The selected file will be added as an attachment and a unique number will appear for that attachment.
14. Oracle KM administrators and Oracle KM workers with permissions to associate an external object (CS_Assoc_Ext_Obj_To_Sol) to a solution have to perform the following steps to add an external object to a solution.
    1. In the External Links section, Click Add.

   2. Select an External Object screen appears. Click the object name that you want to add. A corresponding screen based on your selection appears.
   3. Enter the details. Click Go. The selected object will be entered as an external link.

15. Click Create Solution if you only want to create and save a solution and not submit it to the workflow **or** click Create & Submit if you want to create and also submit a solution to the workflow.
16. If you click Create Solution, Solution Detail screen appears with the solution details. The solution will have a saved status and will be listed in the Work Pending screen. You can update the solution by clicking Update. You can also view, and/or add comments attached to this solution by clicking Comments. (See Adding Comments to a Solution).
17. If you click Create & Submit, Available Authoring Flows screen appears. Select an authoring flow and click OK. Another screen appears that prompts you to select a status. Select a status and click OK. Summary of the solution submitted to the workflow appears. Click OK. Work Pending screen appears from where internal users with necessary permissions can search for a work- in-progress solution by clicking Search Work in Progress and work on it.
18. If you have KM integrated with Oracle Workflow, the Oracle Workflow engine determines the user group that is associated with a particular status of the solution.
19. An email is sent to all members of that user group. Any member can click the link in the email and reply to the email to accept the solution. (See the topic, Solution Approval Process.).

> **Note:** To edit a solution, you must belong to the solution's user group. The solution must be unlocked, and you must have appropriate status specific permissions.

5.3.1 Adding Comments to a Solution

You can add comments to a solution from the Solution Detail screen. Comments are used to provide feedback for correcting a solution or for enhancing the solution value. All added comments will default to a draft status and will have an internal distribution option.

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> Solution >Work Pending. The Work Pending screen with all the solutions in progress appears.
4. Click the numbered link of the appropriate solution to navigate to the Solution Detail screen to view details about the selected solution in progress.
5. In the Statement sub section, click Comments. The Comments on Solution screen appears.
6. Click Add Comment. The Create Comment screen appears with the Solution Number, Author, Distribution, and Creation Date.
7. Enter the comment summary.
8. Enter the comment detail.
9. Click Save.

5.3.2 Solution Approval Process

After creating a solution and submitting it to the workflow, a KM internal user in the assigned user group can either approve or reject the solution. Only one KM user at a time can check out a specific solution. Modifications must be approved prior to publication. Members of a user group who have subscribed to a product or a category will receive notification that a solution is ready for review. See Implementing Oracle KM System chapter in the latest version of *Oracle iSupport Implementation Guide* on Setting up Solution Authoring Profile.

To approve a solution, perform the following steps.

Prerequisites

Anyone who wants to approve or reject a solution has to be a member of the solution’s user group.

You must have status specific permissions i.e, permissions to edit a solution in the draft status, solutions in technical review status, etc.

Steps

1. Log on to Oracle Applications Forms as a KM administrator.
2. The Responsibilities screen appears. Select the workflow user.
3. Navigate to Functionality--> Find Notifications.
4. The Find Notifications screen with a list of all the notifications available for the user appears.

   Note: Users who do not subscribe to any product or category will not get any notification.

5. Click the Notification to select it.
6. Click Accept Job to accept a notification.
7. Navigate to the Oracle CRM Applications login page at: http://<host>:<apache port>/OA_HTML/jtflogin.jsp
8. Enter your user name and password. Log on as a Knowledge Management administrator.
9. Navigate to SMS> Solution >Work Pending. The Work Pending screen with all the solutions in progress appear.
10. Click the numbered link to navigate to the Solution Detail screen to view details about the selected solution in progress.
11. If you want, you can check out and modify the solution. Click Check Out. The Lock Confirmation screen appears. Click OK.
12. The Solution Detail screen appears. Make the required modifications or edits.
13. Click Save and Submit. A screen prompting you to select the next step appears. The options are:
    - Continue the current process
    - Reject the solution
    - Switch to another process

    Note: You can also click Comments to view any comments attached to the solution.

14. If you select Continue the current process or Reject the solution, a screen for you to select a status appears. If you select Switch to another process, the Available Work Processes screen appears. Select a work process and click OK.
15. Depending on your previous selection, select the solution status. Click OK. The Solution Summary appears. Click OK.
16. The Work Pending screen appears with the solution back in the workflow.

5.4 Viewing Solutions in Progress

Solutions in progress are solutions in the workflow that have not been published to external users.

Prerequisites

Internal KM users with view permissions (CS_Solution_View_Internal) can view the solutions in progress.

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> Solution >Work Pending. Work Pending screen with numbered links to the solutions in progress appear.
4. Click the numbered link to navigate to the Solution Detail screen to view details about the solution in progress.

5.5 Searching Solutions in Progress

All internal users can search for solutions in progress.

Steps

1. On the JTF Login screen, log on as a Knowledge Management administrator, a KM agent, or a KM worker.
2. Navigate to SMS> Solution >Work Pending. The Work Pending screen with all the solutions in progress appear.
3. Click Search Work in Progress. Search For Solutions screen appears.

4. Enter one or more search criteria to narrow down the search results.
5. Click Search. Search results appear in the Search Results sub-section.
6. Click the numbered link to view details about the selected solution.

5.6 Setting Up Recommended Solutions

Use this procedure to add or delete solutions from the recommended solutions list and select the sort order in which the recommended solutions will appear.

Prerequisites

KM administrators and KM workers with view permissions (CS_Rec_Sol_View) can view recommended solutions

KM administrators with update permissions (CS_Rec_Sol_Update) can update recommended solutions.

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 > Solution > Recommended. The Recommended Solutions screen appears.
4. To add a solution to the list, click Add. The Add Recommended Solution screen appears. Enter the Solution Number. Click Done.
5. To rearrange a solution, check the check-box next to the solution to be moved and click Move Up or Move Down.
6. To delete a solution from the list, check the check-box next to the solution to be deleted.
7. Click Delete.

5.7 Creating a New Solution Type

Oracle Knowledge Management is seeded with the solution/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. 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. Solution Type screen reappears with a Related section. You can relate statement types or external links to the solution type.

5.8 Viewing a Solution Type

In Oracle Knowledge Management, information is organized into solutions, segmented into solution types. Oracle Knowledge Management is seeded with the 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. Solution Types screen displaying a list of existing solution types appears.

4. Click the numbered link to navigate to the Solution Type screen for the selected solution type to view details about it. You can also update the solution type and add/delete statement types or external links to this solution type on this screen.

5.9 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. Solution Types screen with a list of existing solution types appears.
4. Click a Solution Type Number link. The Solution Type screen for that Solution Type Number appears.
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 statements types or external links, make the required selections.
8. Click Update to save the changes. Click Restore to return to the original values and not save the changes. Click Delete to delete the solution type.

5.10 Deleting a Solution Type

Use this procedure to delete a solution type. You cannot delete the default solution type, symptom, cause, action (SCA). This procedure cannot be undone.

Prerequisites

- KM administrators must have edit permissions (CS_Type_Edit) to delete a statement type.

- Delete any statement types associated to this 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. Solution Type screen appears.
4. Click the numbered link of the solution type that you want to delete.
5. In the Solution Type screen, ensure that there are no related statements types / external links listed in the Related sub section.
6. To remove related statement types:
   a. Click Add / Delete. The Associate Statement Types screen appears. Disassociate the statement type from that solution type.
   b. Click Save. Solution Type screen reappears with no statement types or external links appearing in the Related section.
7. After removing the related statement types, click Delete.

5.11 Creating a Statement Type

A statement is a description of any aspect of a problem, its cause, or its 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. 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. Select an External Object screen appears. Click Note Type.
    6. Note Type screen appears. Search for the note type that you want to add to this statement type. Use % for wildcard search.
    7. Search results appear. Select the JTF note type that you want to add to the statement type. Click Update.

    Note: The name of the JTF note type that you want to add to the statement type must be exactly the same as the statement type.

5.11.1 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. Solution Types screen with a list of existing Solution Types appears.
4. Click the Solution Type Number link. Solution Type screen for the Solution Type Number appears.
5. Click Add/Delete. 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 click Cancel to restore the original values and return to the previous screen.

5.11.2 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. Solution Types screen with a list of existing Solution Types appears.
4. Click the Solution Type Number link. Solution Type screen for the Solution Type Number appears.
5. Click Add/Delete. 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 a statement that you want to disassociate to Available Statements Types box.
7. Click Save to save the changes or Cancel to restore the original values and return to the previous screen.

5.12 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 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. Statement Types screen appears.
4. Click the numbered link to navigate to the Statement Type screen for the selected statement type.

5.13 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. Statement Types screen appears.
4. Click the numbered link to navigate to the Statement Type screen for the selected statement type.
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.

5.14 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.

- Remove a solution type or external link being used by 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. Statement Types screen appears.
4. Click on the numbered link of the statement type that 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 checkboxes corresponding to the related solution types or external links.
   b. Click Update.
7. After removing the related solution types or external links, click Delete. This procedure cannot be undone.

5.15 Adding Solution Categories

You can add solution categories from 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. 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.

5. Click the Add. 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.

5.16 Editing Solution Categories

You can edit solution categories from 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. Manage Solution Categories screen appears.
4. Select the root category or one of the child categories that you want 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.

5.17 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. Manage Solution Categories screen appears.
4. Select the category that you want to delete by clicking the corresponding radio button.
5. Click Delete. The selected category is deleted.

5.18 Creating a New Authoring Flow

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

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. Available Flows screen appears.
4. Click Create. 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 Actions fields.
7. Click Update.

5.19 Viewing Authoring Flows

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

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 navigate to The Authoring Flow Set Up screen to view details about this flow.
5. On this screen you can modify the following parameters for each authoring flow:
   - Order: the numbered order of the flow determining the order in which the flow will be viewed. e.g, a flow with an order number 1 will be viewed before a flow with the order number 5 and so forth.
   - 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. for example, Business User Group, Editorial Reviewers, Technical Reviewers, etc.
   - Actions: an authoring flow can have Notify, Obsolete, or Publish actions.
6. You can also add a new row of values by clicking More Rows arrow or delete a row by selecting a row and clicking Delete.

5.20 Setting Up Frequently Used Definitions for Solutions

You can provide your customers with a list of frequently used solutions for a specific 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 How can we help you section, click Frequently Used Solutions.

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