

**Oracle® iSupport**

Implementation Guide

Release 11*i*

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Oracle iSupport Implementation Guide, Release 11i

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# Send Us Your Comments

## **Oracle iSupport Implementation Guide, Release 11*i***

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Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
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You can send comments to us by electronic mail to [mfgdoccomments\\_us@us.oracle.com](mailto:mfgdoccomments_us@us.oracle.com). Please include your product name in the subject line: Attn: Oracle iSupport.

If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.



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# Preface

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

## 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 iSupport

If you have never used Oracle iSupport, Oracle suggests you attend one or more of the Oracle iSupport training classes available through Oracle University.

- The Oracle Applications graphical user interface.

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

## How To Use This Guide

This guide contains the information you need to implement Oracle iSupport and Oracle Knowledge Management, release 11.5.9. It is organized into the following chapters:

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

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

## Typographic Conventions

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

Convention	Meaning
<i>italic text</i>	Book or chapter titles, emphasis
Courier text	User commands, file content examples, directory names
UPPERCASE	Structured Query Language (SQL) commands, initialization parameters, profile options, responsibilities, or environment variables
<b>boldface text</b>	Menu, button, keyboard, and window options
< >	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 Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

### Accessibility of 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 iSupport 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 iSupport online HTML help is available by selecting 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 Technology Network (<http://otn.oracle.com/documentation>). 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 iSupport and its dependencies are listed below.

- **Oracle iSupport Guides**
  - *Oracle iSupport Implementation Guide*
  - *Oracle iSupport User Guide*
- **Knowledge Management Applications Guides**
  - *Oracle Knowledge Management User Guide*
  - *Oracle Knowledge Management Implementation Guide*
- **Oracle Products Applications Guides**
  - *Oracle Inventory User's Guide*
  - *Oracle Bill of Materials User's Guide*
  - *Oracle Install Base Implementation Guide*
  - *Oracle Install Base User Guide*
- **Oracle Purchasing-Related Applications Guides**
  - *Oracle Order Management Suite Implementation Manual*
  - *Oracle Order Management User's Guide*
  - *Oracle Quoting Implementation Guide*
  - *Oracle Quoting User Guide*
  - *Oracle iStore Implementation and Administration Guide*
  - *Oracle iStore User Guide*
- **Oracle TeleService (Customer Support/Service Request) Application Guides**

- *Oracle TeleService User Guide*
  - *Oracle TeleService Implementation Guide*
- **Oracle Contracts Applications Guides**
  - *Oracle Service Contracts User Guide*
  - *Oracle Contracts Core User Guide*
- **Oracle Telephony Manager Guides**
  - *Oracle Telephony Manager Implementation Guide*
  - *Oracle Telephony Manager User Guide*
- **Oracle Call Center Guides**
  - *Oracle Call Center Connectors Implementation Guide*
- **Oracle Scripting Guides**
  - *Oracle Scripting Implementation Guide*
  - *Oracle Scripting User Guide*
- **Oracle Quality Guide**
  - *Oracle Quality User's Guide*

## **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 *OracleMetaLink* (<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 iSupport (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 Oracle Business Intelligence System, languages and character sets, and self-service web applications.

## **Oracle 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 Rapid Install, which minimizes the time to install Oracle Applications, the Oracle9*i* technology stack, and the Oracle9*i* Application Server technology stack by automating many of the required steps. This guide contains instructions for using 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 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.

## **Oracle Applications 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 *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

### **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 iSupport. This manual details additional steps and setup considerations for implementing Oracle iSupport with this feature.

### **Multiple Organizations in Oracle Applications**

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

### **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 iSupport 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 [OracleMetaLink](#).

### **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 Common Application Components Implementation Guide**

Many products use components from Oracle Common Application Components. 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 iSupport 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 iSupport 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 Oracle9i server, and your hardware and software environment.

### **OracleMetaLink**

OracleMetaLink 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 OracleMetaLink, 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 OracleMetaLink, register at (<http://metalink.oracle.com>). Bugs created against the Oracle iSupport application use the bug identifier number of 381.

**Alerts:** You should check OracleMetaLink 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 that you make using Oracle Applications can update many tables immediately. 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.

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# Introduction

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

- [Oracle E-Business Suite Overview](#)
- [Oracle iSupport Overview](#)

## 1.1 Oracle E-Business Suite Overview

Oracle E-Business Suite is a complete set of business applications that enables you to efficiently manage customer interactions, manufacture products, ship orders, collect payments, and more - all from a business system that shares a single technology foundation. For more information, visit the Oracle web site at:

<http://oracle.com>.

## 1.2 Oracle iSupport Overview

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

A fully-realized Oracle iSupport implementation can reduce service costs, consolidate service and product information, and allow service personnel to focus on non-repetitive customer requests, thus increasing customer satisfaction and product viability.

## 1.2.1 Oracle iSupport Key Features

Key features and benefits of Oracle iSupport include the following:

### 1.2.1.1 Service Request

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

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

A typical business scenario is:

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

### 1.2.1.2 Knowledge Base

Oracle Knowledge Management implementation allows access to the known problems/solutions database, and permits users to locate technical documents, including white papers, user guides, and FAQs. The merchant benefits by increased knowledge among customers and reduced call center activity. The Oracle

Knowledge Management user interface is easy to use and features flexible search capabilities. For additional information, see the *Oracle Knowledge Management Implementation Guide* and *Integrating Oracle iSupport with Oracle Knowledge Management* chapter of this guide.

A typical business scenario is:

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

### 1.2.1.3 Account Management

Oracle iSupport'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 Service Contracts Implementation Guide*.

A typical business scenario is:

- Customer logs in to Oracle iSupport.
- Using the Accounts tab, the customer has online, real-time access to information regarding account data, including:
  - Orders
  - Shipments
  - Invoices
  - Payments

- Contracts
- Returns

#### **1.2.1.4 Products Repository**

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

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

A typical business scenario is:

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

#### **1.2.1.5 Oracle iSupport Homepage**

Oracle iSupport's homepage features links to support areas of the application.

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

Merchants can send alerts and other system messages to the homepage for viewing by general users and employees. The merchant has the option of making some homepage content mandatory.

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

A typical business scenario is:

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

### 1.2.1.6 Oracle iSupport Forums

Oracle iSupport 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 iSupport, users can search for specific subjects or browse within a particular forum. Oracle iSupport allows merchants to create and manage forums, and to use forum moderators for certain forum administrative tasks. For more information, see the Setting up iSupport Forums topic area in this guide's *Implementation Tasks* chapter.

A typical business scenario is:

- Customer logs in to Oracle iSupport.
- Customer accesses the Forum tab to view organized categories and forums subcategories.
- Customer selects a hyperlinked forum message, views the message, and can post a new message underneath that forum message or start a new message thread.
- Customer can use forums signature feature to allow personalized signing of his forum messages.
- Customer can use Advanced Search to query by keyword, category, date, message status, and author.



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# Technology, Requirements, and Performance

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

## 2.1 Architectural Overview

Oracle iSupport runs on a 3-tier system composed of:

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

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

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



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# Dependency Requirements and Verification

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

- [Overview of Dependencies](#)
- [Mandatory Dependencies](#)
- [Conditional Dependencies](#)

## 3.1 Overview of Dependencies

Because Oracle iSupport is composed of multiple Oracle modules that supply varied data and functionality, merchants can choose which modules to implement based on their specific business requirements. These integrated modules present many dependencies to Oracle iSupport.

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

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

## 3.2 Mandatory Dependencies

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

### **3.2.1 Oracle Application Object Library**

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

### **3.2.2 Oracle Common Application Components**

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

### **3.2.3 Oracle Workflow**

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

### **3.2.4 Oracle Trading Community**

The 11i Oracle Trading Community Architecture 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 Architecture is used by both Oracle ERP and Oracle CRM applications. In Release 11i, Oracle's customer model is based on Oracle Trading Community Architecture.

Some APIs for Oracle Trading Community Architecture are published as part of this release. Refer to current Oracle Trading Community Architecture documentation for API details.

### **3.2.5 Oracle Accounts Receivable**

A central data repository for customer information that uses the Oracle Trading Community Architecture model, Oracle Accounts Receivable provides customer account data for Oracle iSupport. After a customer books an order in an Oracle CRM application, an account is created in Oracle Accounts Receivable. If a customer

is directly created in Oracle Accounts Receivable, then an account number is also generated. Oracle Accounts Receivable also calculates taxes and generates invoices.

### 3.2.6 Oracle General Ledger

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

### 3.2.7 Oracle Human Resource Management System

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

### 3.2.8 Oracle CRM Foundation

CRM Foundation 11i suite of applications supplies a significant amount of functionality for Oracle iSupport. The CRM Foundation software suite is split into two distinct but interrelated application groups:

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

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

## 3.3 Conditional Dependencies

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

### 3.3.1 Oracle TeleService

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

### 3.3.2 Oracle Inventory and Oracle Install Base

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

### 3.3.3 Oracle Bills of Materials

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

### 3.3.4 Oracle Order Management

Oracle Order Management processes orders booked in Oracle Quoting, Oracle iStore, and Oracle Order Management itself. Oracle Order Management and Oracle Quoting are both integral applications for returns functionality in Oracle iSupport. Oracle Order Management integrates with Oracle Pricing for determining prices of goods sold and Oracle Shipping for shipping execution. Oracle Order Management uses Oracle Receivables for keeping records of customers and invoices, and capturing payments. Oracle Order Management also depends on Oracle General

Ledger. Setup information is in the chapter, *Integrating Oracle iSupport with Products and Returns*.

### 3.3.5 Oracle Quoting and Order Capture APIs

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

### 3.3.6 Oracle Purchasing

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

### 3.3.7 Oracle iStore

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

### 3.3.8 Oracle Contracts Suite

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

#### 3.3.8.1 Oracle Contracts Core

Oracle Contracts Core is both an application that provides supporting master agreements and a foundation for all other Oracle Contracts modules. The generic functionality required by all types of contracts is contained in the Oracle Contracts

Core foundation layer, such as contract access control, renewal, termination, and notification management.

### **3.3.8.2 Oracle Service Contracts**

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

## **3.3.9 Oracle Customer Care**

The Oracle Customer Care part of Oracle TeleService is composed of four modules:

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

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

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

## **3.3.10 Oracle Knowledge Management**

In Oracle iSupport, Oracle Knowledge Management allows knowledge base searches during service request creation, the display of frequently used solutions on the home page, and knowledge base searches from the Support tab. Setup information is in the chapter, [Integrating Oracle iSupport with Oracle Knowledge Management](#).

## **3.3.11 Oracle Marketing Encyclopedia System**

In Oracle iSupport, Oracle Marketing Encyclopedia System provides functionality for publishing information to the home page Alerts bin, displaying other optional home page content, and searching and browsing the technical library. Setup

information can be found in the *Oracle Marketing Encyclopedia System Implementation Guide*.

### 3.3.12 Web Call-Back Dependencies

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

### 3.3.13 Oracle Scripting

Oracle iSupport uses Oracle Scripting to provide Surveys functionality. Oracle Scripting also presents scripts to the desktop of an Interaction Center agent to aid customer service. For further information, see the [Setting Up Oracle iSupport Surveys](#) topic in the *Implementation Tasks* chapter.



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# Implementation Overview

This chapter provides an overview of the implementation process for Oracle iSupport for Release 11*i*.

Topics include:

- [Process Overview](#)
- [Implementation Task Sequence](#)

## 4.1 Process Overview

Oracle iSupport relies on other Oracle applications for its functionality. In order to successfully implement Oracle iSupport, you must set up its mandatory dependencies, and optionally, its conditional dependencies.

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

## 4.2 Implementation Task Sequence

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

**Table 4–1 Oracle iSupport Implementation Steps**

<b>Step</b>	<b>Required?</b>	<b>Related Documentation</b>
Install Oracle iSupport	Yes	<i>Oracle iSupport Implementation Guide</i>
Confirm General Oracle Applications Setups	Yes	<i>Oracle iSupport Implementation Guide, Preface</i>
Perform System Administrator Setups for Oracle iSupport	Yes	<i>Oracle iSupport Implementation Guide</i> <i>Oracle Applications System Administrator's Guide</i>
Setting Up Oracle Workflow	Yes	<i>Oracle iSupport Implementation Guide, Chapter 10, Integrating Oracle iSupport with Oracle Workflow</i> <i>Oracle Workflow User's Guide</i> <i>Oracle Workflow Web Services Guide</i> <i>Oracle Workflow Client Installation Notes for Oracle Applications</i>
Setting Up Oracle CRM Foundation	Yes	<i>Oracle Common Application Components Implementation Guide</i>
Setting Up Oracle iSupport Users	Yes	<i>Oracle iSupport Implementation Guide, Chapter 5, Implementation Tasks</i>
Setting Up Oracle iSupport Homepage	Yes	<i>Oracle iSupport Implementation Guide, Chapter 5, Implementation Tasks</i>
Setting Up CRM User Management Framework	No	<i>Oracle Common Application Components Implementation Guide</i>
Setting Up Service Request	No	<i>Oracle iSupport Implementation Guide, Chapter 7, Integrating Oracle iSupport with Service Request</i> <i>Oracle TeleService Implementation Guide</i>
Setting Up Products and Returns	No	<i>Oracle iSupport Implementation Guide, Chapter 8, Integrating Oracle iSupport with Products and Returns</i>
Setting Up Oracle Knowledge Management	No	<i>Oracle iSupport Implementation Guide, Chapter 9, Integrating Oracle iSupport with Oracle Knowledge Management</i>
Setting Up Oracle iSupport Forums	No	<i>Oracle iSupport Implementation Guide, Chapter 5, Implementation Tasks</i>
Setting Up Oracle iSupport Surveys/Feedback	No	<i>Oracle iSupport Implementation Guide, Chapter 5, Implementation Tasks</i>
Setting Up Oracle iSupport Web Call-Back	No	<i>Oracle iSupport Implementation Guide, Chapter 5, Implementation Tasks</i>

**Table 4–1 Oracle iSupport Implementation Steps**

<b>Step</b>	<b>Required?</b>	<b>Related Documentation</b>
Setting Up Oracle Contracts Applications	No	<i>Oracle iSupport Implementation Guide, Chapter 5, Implementation Tasks</i> <i>Oracle Contracts Core Implementation Guide</i> <i>Oracle Service Contracts User Guide</i>
Setting Up Oracle Customer Care	No	<i>Oracle TeleService Implementation Guide</i>
Setting Up Page-Level Look and Feel	No	<i>Oracle iSupport Implementation Guide, Chapter 5, Implementation Tasks</i>
Setting Up Custom Menus	No	<i>Oracle iSupport Implementation Guide, Chapter 5, Implementation Tasks</i>
Verify the Implementation	No	<i>Oracle iSupport Implementation Guide, Chapter 6, Verifying the Implementation</i>



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## Implementation Tasks

This topic group provides step-by-step implementation tasks for setting up Oracle iSupport Release 11*i*. Topics include:

- [Installing the Application](#)
- [Confirming General Oracle Applications Setups](#)
- [Performing System Administration Setups](#)
- [Setting Up Oracle Workflow](#)
- [Setting Up Oracle CRM Foundation](#)
- [Setting Up Oracle iSupport Users](#)
- [Setting Up Oracle iSupport Homepage](#)
- [Setting Up Oracle CRM User Management Framework](#)
- [Setting Up Service Request](#)
- [Setting Up Products and Returns](#)
- [Setting Up Knowledge Base Applications](#)
- [Setting Up Oracle iSupport Forums](#)
- [Setting Up Oracle iSupport Surveys](#)
- [Setting Up Oracle iSupport Web Call-Back \(Call Me\)](#)
- [Setting Up Oracle Contracts Applications](#)
- [Setting Up Oracle Customer Care](#)
- [Setting Up Page-Level Look and Feel](#)
- [Setting Up Custom Menus](#)

- [Verifying the Implementation](#)

## 5.1 Installing the Application

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

To obtain the Maintenance Pack, go to the *OracleMetaLink* home page and select Patches (left hand menu), enter the patch number in the Patch Number box, select your platform in the Platform box, and select the Submit button.

Customers who are upgrading from an earlier version of applications (Release 10.7 or Release 11 for example) or conducting a fresh installation of the applications should order the latest Release 11i CD Pack from Oracle Store (<http://store.oracle.com>).

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

Oracle iSupport is available on the Oracle CD Pack and on *OracleMetaLink* (<http://metalink.oracle.com>).

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

### 5.1.1 Running Rapid Install

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

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

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

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

For more information on Rapid Install, see the latest version of *Installing Oracle Applications* and *Upgrading Oracle Applications*.

### 5.1.2 Using the Oracle Application Implementation Wizard

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

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

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

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

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

## 5.2 Confirming General Oracle Applications Setups

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

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

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

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

Technical Libraries > ERP Applications > Applications Installation and Upgrade.

### 5.2.1 Confirming Oracle Trading Community Architecture Setup

Ensure the setup of the following in the model for the Oracle Trading Community Architecture:

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

Refer to current Trading Community Model documentation for additional details.

## 5.2.2 Confirming Accounts Receivable Setup

Confirm the setup of Oracle Accounts Receivable.

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

## 5.2.3 Defining Employees

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

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

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

## 5.2.4 Confirming Oracle Foundation Technology Stack Setup

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

## 5.3 Performing System Administration Setups

The merchant implementing Oracle iSupport receives a system administrator login and uses that login in the setup of the application. The system administrator username and password that are seeded are: sysadmin/sysadmin. It is recommended that you change this password to something unique.

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

## 5.3.1 Confirm Menus/Functions Setup

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

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

### 5.3.1.1 Confirm Functions

Functions link to coding within specific JSPs and to application menus. Those necessary for Oracle iSupport are seeded in AOL. To view Functions in AOL, log into the Oracle Forms application as sysadmin and navigate to System Administrator > Application > Function. From there, query for function names that begin with IBU\_.

### 5.3.1.2 Confirm iSupport Menus

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

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

## 5.3.2 Understanding Responsibilities and Roles

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

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

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

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

### 5.3.3 Set Up Profile Options

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

### 5.3.4 Set Up Properties

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

- Company key components
- Quick Find window key components

#### Steps

1. Log in to the JTF user interface as sysadmin/sysadmin.
2. Navigate to Settings > System > Advanced. Select Oracle iSupport's product code, IBU, from the View drop list.
3. Set the following company key components to appropriate values:
  - COMPANY\_ADDRESS
  - COMPANY\_EMAIL ADDRESS
  - COMPANY\_MERCHANT\_NAME
  - COMPANY\_NAME
  - COMPANY\_URL
4. To confirm the set up the Quick Find window items, verify that the following values are set:
  - oracle.apps.ibu.requests.bean.RequestSearchFactory
  - oracle.apps.ibu.knowledge.bean.TechLibSearchFactory
  - oracle.apps.ibu.communities.bean.MyForumSearchFactory
  - oracle.apps.csi.qk.CsiqkInstanceFactory

- oracle.apps.cs.knowledge.bean.SolutionSearchFactory
  - oracle.apps.cs.knowledge.bean.SolutionCategorySearchFactory
5. Next, verify that the Quick Find window key components are set according to what your business processes require. Remove any items that you do not wish to use
- When deleting items, be sure to remove the pairs of items that end in .categories and .desc.

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

**Install Base:**

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

**Forums:**

- service.oracle.apps.ibu.communities.bean.MyForumSearchFactory.categories  
The value of this component is Forums.
- service.oracle.apps.ibu.communities.bean.MyForumSearchFactory.desc  
The value of this component is MyForumSearch.item.

**Knowledge Management:**

- service.oracle.apps.ibu.knowledge.bean.SMSSearchFactory.categories  
The value of this component is Solutions.
- service.oracle.apps.ibu.knowledge.bean.SMSSearchFactory.desc  
The value of this component is SMSSearch.item.

**Marketing Encyclopedia System (MES):**

- service.oracle.apps.ibu.knowledge.bean.TechLibSearchFactory.categories  
The value of this component is Library.
- service.oracle.apps.ibu.knowledge.bean.TechLibSearchFactory.desc  
The value of this component is TechLibSearch.item.

**Service Request:**

- `service.oracle.apps.ibu.knowledge.bean.RequestSearchFactory.categories`  
The value of this component is Service Requests;
- `service.oracle.apps.ibu.knowledge.bean.RequestSearchFactory.desc`  
The value of this component is RequestSearch.item.

## 5.4 Setting Up Oracle Workflow

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

## 5.5 Setting Up CRM Foundation

Set up and/or confirm the setup of the CRM Foundation software suite. Oracle iSupport service request functionality uses the Notes, Resources, and Assignment Manager modules. Oracle Knowledge Management functionality also uses Notes and Resources. Thus, at a minimum, you should be familiar with the setup and functionality of Notes, Resources, and Assignment Manager. For information on the Oracle iSupport-specific setups related to these modules, see these chapters:

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

Refer to *Oracle Applications CRM System Administrator's Guide* and *Oracle Common Application Components Implementation Guide* for full implementation details.

## 5.6 Setting Up Oracle iSupport Users

Oracle iSupport uses the Oracle CRM User Management Framework. Because Oracle iSupport also has its own user responsibilities and roles, this section contains information on setting up Oracle iSupport users exclusive of the new framework. See [Setting up Oracle CRM User Management Framework](#) for more information on its functionality.

### 5.6.1 Setting Up Oracle iSupport Administrator

The merchant implementing Oracle iSupport uses the sysadmin login to set up the Oracle iSupport Administrator. This is a required user and is not one of the seeded user types within the CRM User Management Framework.

The Oracle iSupport Administrator responsibility, iSupport System Administrator, is seeded in AOL. This responsibility has the responsibility key IBU\_SYS\_ADMIN.

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

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

- Setting up users and assigning appropriate roles and responsibilities
- Setting up the application homepage
- Setting up optional service request functionality
- Setting up optional products and returns modules
- Setting up optional knowledge management modules
- Setting up optional accounts functionality
- Setting up iSupport forums
- Setting up iSupport Call Me (web call-back)
- Setting up iSupport Surveys/Feedback feature

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

### **5.6.1.1 Steps to Set Up Oracle iSupport Administrator**

Follow the steps below to set up the Oracle iSupport Administrator.

#### **Prerequisite:**

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

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

### Associate User Name with Employee and Assign Responsibility

1. Log in to the Oracle Forms application as sysadmin. Select System Administrator responsibility. Navigate to Security > Users > Define. The Users window opens.
2. In the Users window, enter the username for the Oracle iSupport Administrator. An example is IBUADMIN. (IBU is the product code for Oracle iSupport.)
3. Associate the user with an employee by using the Person LOV in the User Form. Select the desired association by double-clicking on the employee name.
4. Tab to Password field and enter a password. Tab to clear the field and re-enter the same password to validate.
5. In the Responsibilities tab, select the IBU\_SYS\_ADMIN responsibility.
6. Save changes.
7. Still using System Administrator responsibility, navigate to Profile > System.
8. Query with the username in the username field and JTF%DEF% in the Profile field.
9. Set the following profile option at the user level for the administrator:
  - JTF\_PROFILE\_DEFAULT\_APPLICATION - 672

This tells the system that the default application for this user is Oracle iSupport, whose application ID is 672.
10. Find the responsibility ID for the IBU\_SYS\_ADMIN responsibility (see steps below) and enter that value as the JTF\_PROFILE\_DEFAULT\_RESPONSIBILITY value. Set at user level.

This tells the system that the default responsibility for this user is IBU\_SYS\_ADMIN.

#### 5.6.1.2 Finding Responsibility ID

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

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

- b. From the top menu, select View > Find. Search for the IBU\_SYS\_ADMIN responsibility. After this is found, highlight the responsibility, and select Ok in the search window. The Responsibilities window is populated with the information for the responsibility.
  - c. With the cursor in any field of the record, select Help > Diagnostics > Examine. The Examine Field and Variable Values window opens.
  - d. In the Examine Field and Variable Values window, select RESPONSIBILITY\_ID from the Field LOV. The Value field displays the value of RESPONSIBILITY\_ID.
11. Save and close the window.

### **Assign Role(s)**

1. Navigate to Users > Registration > User Maintenance.
2. Find the user who will be the Oracle iSupport Administrator. Select the underlined hyperlink of the username.
3. Select Roles. Assign IBU\_SYSTEM\_ADMIN and IBU\_REG\_USER to the user.
4. Select Update.
5. Log out.

### **Verification**

1. Log in to the JTF login as the Oracle iSupport Administrator just created.
2. Verify that appropriate menus are displayed. The Oracle iSupport Administrator has the following main tabs on the UI:
  - Home
  - Support (subtabs: Ask Me, Technical Library, Forum, View/Update Requests, and Create Request.)
3. Under Profile, the Oracle iSupport Administrator has access to the following links:
  - Personal Profile
  - Contact Points
  - Addresses
  - Navigation Preferences
  - Display Preferences

- Accounts
  - Support
  - My Enrollments
  - A section for Company Information.
4. Select the Administration button at the top of the window. Verify that the Oracle iSupport Administrator can access the following administrator tabs:
    - User (subtabs: User, Pending Approvals)
    - Homepage (subtabs: Content, Subscription)
    - Support (subtabs: Request Management, Call Me, Survey, Technical Library, Usergroup)
    - Forum (subtabs: Category, Forum, Messages, User Group)
    - Solutions (subtabs: Setup, Solution, Search)
    - MES

## 5.6.2 Steps to Assign Additional Roles and Responsibilities

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

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

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

1. Log into Oracle iSupport as the Oracle iSupport Administrator.
2. Navigate to Administration > Users. Search for the user whom you wish to modify.
3. Select the underlined link of the username.
4. In the Personal Profile window, select either Roles or Responsibilities as appropriate.

5. Assign the roles/responsibilities as desired. *If you assign additional responsibilities, then be sure to select a default responsibility.*

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

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### 5.6.3 Setting Up an Oracle iSupport Primary User

The Oracle iSupport Primary User typically:

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

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

#### Steps to Set Up an Oracle iSupport Primary User

Follow the steps below to set up the Oracle iSupport Primary User.

##### Registration

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

**Note:** If you have already set up this user through the Oracle Forms interface, Oracle Human Resources Management System (HRMS), or your company's own HR application, then you may skip the Registration step. Instead, associate an employee with a user name in the Forms application (as you did with the administrator-user), and assign the iSupport Primary User responsibility there. This has the responsibility key IBU\_PRIMARY\_USER\_RESP.

2. Select Primary User as the user type; select Next.
3. Enter the company ID in the textbox and Submit. The company ID is a unique number assigned during company registration. The User Registration window appears.

4. Enter required information on the User Registration window. *Make a note of the username and password.* Select Submit. The Available Enrollments window appears.
5. Select Self-Service Support Over the Web and select Next.  
**Note:** The Enrollments window brings in the CRM User Management Framework. The default roles and responsibilities linked to the Self-Service Support Over the Web enrollment will be assigned to this user upon approval. See the topic, Seeded [Self-Service Support Over the Web Enrollment](#), for default roles and responsibilities that are seeded by user type for this enrollment.
6. A confirmation message appears. Select Next.

### Approval

1. Log in to the JTF login page as sysadmin.  
**Note:** It is possible to set up a user other than sysadmin to be the approver. Consult the *Oracle CRM Technology Foundation Implementation Guide* and the *Oracle CRM Technology Foundation Concepts and Procedures* for details.
2. Navigate to Users > Registration > Pending Approvals.
3. In the Request Summary window, select the appropriate underlined username.
4. Fill in the mandatory information. Select Next.
5. Select the Accounts button. Choose the company account(s) to associate with the user. Select Next.
6. Enter any comments in the Comments area. Select Accept.

### Verification

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

**User Profile:**

- Personal Profile
- Contact Points
- Addresses
- Navigation Preferences
- Display Preferences
- Accounts
- Support
- My Enrollments

**Company Profile:**

- Information
  - Contact Points
  - Addresses
  - Administrators
4. Select the Administration button at the top of the window. Verify that the Primary User can access the following administrator tabs:
- User
  - Pending Approvals

## 5.6.4 Setting Up Employee User

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

### 5.6.4.1 Steps to Set Up Employee User

Follow the steps below to set up this user.

**Prerequisite:**

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

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

### **Steps**

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

### **Assign Role(s) and Default Responsibility**

1. Log in to the JTF login page as Oracle iSupport Administrator. Navigate to Administration > User.

2. Search for the user. After you find the user, select the underlined hyperlink of the username. The Personal Profile page appears.
3. Select Roles. Assign IBU\_REG\_USER and IBU\_EMPLOYEE to the employee.
4. Save your work.
5. Return to the Personal Profile page. Select Responsibilities and assign iSupport Employee User as the *default* responsibility for this user. This responsibility has the key IBU\_EMPLOYEE\_USER\_RESP.
6. Save your work.

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**Note:** When setting up new users of the Install Base functionality, please add the role, CSI\_END\_USER, to them. This role contains the required permissions for Oracle Install Base general users.

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### Verification

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

#### User Profile:

- Personal Profile
- Contact Points
- Addresses
- Navigation Preferences
- Display Preferences
- Support

## 5.6.5 Setting Up Business (B2B) User

B2B (business users) are generally customers who have accounts on the merchant and are not associated with the merchant's company. These users select the Register Here link on the JTF login page to register.

### 5.6.5.1 Steps to Set Up B2B User

Follow the steps below to set up this user.

#### Registration

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

---

---

**Note:** When setting up new users of the Oracle Install Base functionality, add the role CSI\_END\_USER to them. This role contains the required permissions for Oracle Install Base general users.

---

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#### Approval

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

### **Verification**

1. At the JTF login page, log in as the user just created.
2. Verify that appropriate menus are displayed. The B2B User will have the following main tabs on the UI:
  - Home
  - Accounts (subtabs: Orders, Invoices, Payments, Contracts, Returns, Products)
  - Support (subtabs: Ask Me, Technical Library, Forum, View /Update Requests, Create Request)
3. Under the Profile button, the B2B User has access to the following links:

#### **User Profile:**

- Personal Profile
- Contact Points
- Addresses
- Navigation Preferences
- Display Preferences
- Accounts
- Support
- My Enrollments

#### **Company Profile:**

- Information
- Contact Points
- Addresses
- Administrators

## **5.6.6 Setting Up Individual (B2C) User**

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

A B2C user's seeded approval process in the CRM User Management Framework is automatic. B2C users thus can access the application immediately after registering, unless you set up a separate approval process. Consult the *Oracle Common Application Components Implementation Guide* for more details.

### 5.6.6.1 Steps to Set Up B2C User

Follow the steps below to set up this user.

#### Registration

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

#### Verification

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

#### User Profile:

- Personal Profile
- Contact Points
- Addresses
- Navigation Preferences
- Display Preferences

- Accounts
- Support
- My Enrollments

### 5.6.7 Setting Up Knowledge Management Administrator-User

This is an administrator-user who performs Oracle Knowledge Management setup and management. This user is required only if a merchant uses the Knowledge Management functionality. Often the Oracle iSupport Administrator is set up to perform this function. For more information, see the *Oracle Knowledge Management Implementation Guide*.

### 5.6.8 Setting Up Survey Administrator-User

This is a user who performs Surveys setup and management. This User Type is not seeded in the JTT user management framework. This user is required only if a merchant uses Surveys. For more information, see the [Setting Up iSupport Surveys](#) topic of this chapter.

### 5.6.9 Setting Up Guest User

A guest user is one who comes to the Oracle iSupport site and does not log in explicitly. Use this procedure to set up a guest user.

#### Steps

1. Create the fnd user.
2. Create any parties and accounts that must be linked to this user.
3. Set the appropriate value in the profile option iSupport Guest Responsibility, whose default value is iSupport Guest Responsibility.
4. Set the appropriate value in the profile option iSupport Guest Quick Find Display, whose default value is N. If you decide to display the Quick Find menu to guest users, then also set up the appropriate search categories that can be displayed to guest users. Refer to the *Oracle JTT Developer's Guide* for instructions.
5. Set the appropriate value for the guest user in the profile option JTF\_DEFAULT\_RESPONSIBILITY.

6. Assign the proper role to the guest user. The role IBU\_GUEST is shipped out of the box.
7. Set the JTT property for guest\_username, and guest\_password.
8. Set up the guest user group. The required SQL is the following:

```
select party_id from hz_parties where party_id in ( Select customer_id from
fnd_user where user_name in (select upper(b.attribute_value) from jtf_perz_
data a, jtf_perz_data_attrib b where a.perz_data_type = 'JTF' and a.perz_
data_name = 'guest_username' and a.perz_data_id = b.perz_data_id))
```
9. Run the concurrent program IBU\_PRODUCT\_UUGCP to populate the user group users.
10. If you want to hide certain categories from the Quick Find drop down, then set up the categories in the JTT system administrator console.
11. Hide the Logout button by creating the property in the JTT system console under iSupport. By default this is set up for IBU\_GUEST\_USER\_RESP. If you up a different responsibility for the guest user, then set this up manually:

```
Ui.nav.logout.disabled.resp.<resp key> = true;
```
12. If you want to use the home page, `ibuhpage.jsp`, as the login page for normal registered users, then modify the JTT property to set the `.logout.page` property to point to this JSP, and set this URL to be used to access Oracle iSupport. Otherwise, inform guest users of a special URL to use for guest user access.
13. Do not expose any functionality to guest users that have not been guest enabled.
14. If you do not want to expose all guest-enabled pages to guest users, then explicitly remove the corresponding permissions from the guest user role.
15. Optionally customize the message IBU\_G\_LOG\_NOTE. This message is displayed to guest users, if the guest user feature is enabled, on the right hand side of Oracle iSupport pages. If you do not want to display the message, then set this message to "null."

---

**Note:** Oracle iSupport uses same guest user that Oracle iStore uses. If Oracle iStore is being used, then you do not need to create a guest user, but you still need to do the other setups.

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## 5.7 Setting Up Oracle iSupport Homepage

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

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

The sections that follow discuss Homepage options.

### 5.7.1 Add Oracle Marketing Encyclopedia System Content to Homepage

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

#### Prerequisites

- Set up Oracle Marketing Encyclopedia System.
- Publish content within Oracle Marketing Encyclopedia System.
- Verify Oracle Marketing Encyclopedia System setup.

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

#### Steps

1. Log in to the JTF login window as the Oracle iSupport Administrator.
2. Navigate to Administration > Homepage > Content > Add MES Content (bottom of window).

3. In the Add MES Content window, the content you have published in Oracle Marketing Encyclopedia System appears. Select the content that you wish to add by selecting the appropriate checkbox.
4. Select Save. The Content Administration window appears.
5. Navigate to the Home tab on the general user UI to verify that the content appears on the page.

## 5.7.2 Understanding the Add/Update Content Page

The Add/Update Content page allows you to:

- Set content as mandatory.
- Disable existing content.

### 5.7.2.1 Setting Homepage Content as Mandatory

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

- Cannot be disabled by users.
- Always appears at the top of the column that 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 window as the Oracle iSupport Administrator.
2. Navigate to Administration > Homepage > Content. The Content Administration window appears.
3. Select the underlined hyperlink of the content you wish to make mandatory. The Update Content window appears.
4. In the Update Content window, select the Mandatory checkbox.
5. Select Update.

### 5.7.2.2 Disabling Homepage Content

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

### Steps

1. Log in to the JTF login window as the Oracle iSupport Administrator.
2. Navigate to Administration > Homepage > Content. The Content Administration window appears.
3. Select the underlined hyperlink of the content you wish to disable. The Update Content window appears.
4. In the Update Content window, select the Disable checkbox.
5. Select Update.

## 5.7.3 Changing Mandatory Bin Layout/Display

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

### Steps

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

## 5.7.4 Enabling Homepage Subscription E-Mails

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

- Set up template.
- Run necessary concurrent programs.

### Prerequisites

- The e-mail subscription feature must be activated for the user who is to receive the e-mails. Navigate to Profile > Support; select content and delivery days as desired.

- You must be running Oracle Workflow to enable this feature. For more information, refer to the chapter in this guide, *Integrating Oracle iSupport with Oracle Workflow*.

#### 5.7.4.1 Setting Up E-Mail Subscription Templates

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

##### Steps

1. Log in to the JTF login as Oracle iSupport Administrator.
2. Navigate to Administration > Homepage > Subscription. The Subscription Template Administration window appears.
3. In the Subject text field, enter the text to display as the subject of the e-mail that will be sent to the user.
4. In the Header and Footer fields, enter the information you wish to display in the header (top) and/or footer (bottom) area of the template.  
  
Use the Clue Word/Description table (copy and paste as desired) at the bottom of the window to build the header and footer text.
5. Optionally, select Preview to see how the framework will appear to the user.
6. To save changes, select Update. A confirmation message appears.

#### 5.7.4.2 Running Concurrent Programs

In Oracle (Forms) Applications, run the Notification Mailer and IBU\_PRODUCT\_EMGEN concurrent programs. See *Oracle Applications Concepts Release 11i* for more information on running concurrent programs. For more information on Oracle Workflow, see the chapter in this guide, *Integrating Oracle iSupport with Oracle Workflow*. Also consult the *Oracle Workflow User's Guide*.

## 5.8 Setting Up CRM User Management Framework

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

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

The information in this section is meant to give you an overview of the user management framework concepts. Consult the *Oracle Common Application Components Implementation Guide* and the *Oracle Common Application Components User's Guide* for more details.

## 5.8.1 Setting Up Enrollments (Subscription Services)

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

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

One enrollment can equal:

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

### 5.8.1.1 Seeded Self-Service Support Over the Web Enrollment

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

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

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

<b>Responsibility</b>	<b>Description</b>
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 iSupport user types for the Self-Service Support Over the Web Enrollment.

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

<b>Role</b>	<b>Description</b>
IBU_REG_USER	Individual User (B2C) or Business User (B2B)
IBU_B2B_PRIMARY_USER_MANAGEMENT and IBU_REG_USER	Primary User

### 5.8.1.2 Modifying Seeded Enrollments

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

## 5.8.2 Setting Up Registration Templates

Applications require different pieces of information to register various user types. Registration of a sales representative might require the sales territory, while a consumer registration would need to include the credit card number. Registration data is being stored in different tables - some is common data and is stored (mostly) in the Trading Community Architecture (TCA); the rest is stored into application-specific tables.

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

Characteristics of registration templates include:

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

### 5.8.2.1 Defining New Registration Templates

New registration templates can be created using the JTF sysadmin console. Consult the *Oracle Common Application Components Implementation Guide* and the *Oracle Common Application Components User's Guide* for details.

## 5.8.3 Setting Up Approval Processes

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

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

### 5.8.3.1 Seeded JTF Approval Processes

User Type seeded approval processes are:

- **Individual User** - No approval required
- **Business User** - Approval notification sent to Primary User(s)
- **Primary User** - Approval notification sent to Oracle iSupport Administrator, or System Administrator

### 5.8.3.2 Who Can Be an Approver?

- **Request Owner** - This user is the current approver based on the approver list and current state of workflow defined for given approval. The Request Owner will only be able to approve the requests that are owned by him. This user should have JTF\_APPROVER permission.

- **Oracle Applications System Administrator (sysadmin)** - The sysadmin will see and be able to approve all pending requests. Users who have the JTF\_REG\_APPROVAL permission are considered sysadmins. The Oracle iSupport Administrator role (IBU\_SYSTEM\_ADMIN) has the JTF\_REG\_APPROVAL permission.
- **Oracle iSupport Administrator** - The Oracle iSupport Administrator sees a list of pending approvals. Users who have the IBU\_SYSTEM\_ADMIN role are considered to be the Oracle iSupport Administrator.

For primary users to see the list of pending approvals in their company, the administrator must do the following setup:

- a. Create a dummy user JTA\_DUMMY through the fnd\_user window.
  - b. Assign CRM\_PRIMARY\_USER responsibility to this user.
  - c. Assign the JTF\_APPROVER role to this user.
  - d. Set this user to be the value of the JTF\_PRIMARY\_USER profile option.
- **Primary User** - This user can view and approve the requests that are assigned to the Primary User role, as well as the requests owned by the Primary User. The requests assigned to the Primary User role are filtered based on the current approver's organization. Primary Users need the JTF\_PRIMARY\_USER\_SUMMARY role to view the pending requests page showing their list of users waiting approval. Requests assigned to the Primary User role are identified by the JTF\_PRIMARY\_USER profile option, which should be set to a predetermined username or an FND dummy user. The name used for the Primary User Role needs to be in the approval hierarchy if the primary user is needed for approval.

For a primary user to see the list of pending approvals in his company, the administrator must do the setup described under the section about the Oracle iSupport Administrator.

A primary user does not see any listing on the pending approvals page unless his turn in the approval process. For example, if the approval chain is A, B, C, where C is the JTA\_DUMMY, then only after A and B has approved the user will the primary user see this in his pending approval window.

### 5.8.3.3 Defining a New Approval Process

New approval processes can be defined on the JTF sysadmin console. Consult the *Oracle Common Application Components Implementation Guide* and the *Oracle Common Application Components User's Guide* for details.

## 5.9 Setting Up Service Request

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

## 5.10 Setting Up Products and Returns Applications

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

## 5.11 Setting Up Knowledge Base Applications

The following Oracle knowledge base applications integrate with Oracle iSupport:

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

MES is also known as the Technical Library.

### 5.11.1 Setting Up Knowledge Management

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

### 5.11.2 Setting Up Marketing Encyclopedia System

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

## 5.12 Setting Up iSupport Forums

The sections below details steps for setting up Oracle iSupport interactive forums.

### 5.12.1 Creating Categories

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

#### Steps

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

2. Navigate to Administration > Forum > Category > Create. The Create New Category window appears.
3. You can choose to have the category exist at the topmost (root) level, or you can structure the category to be a sub-category of another category.

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

Guidelines for creating additional categories:

- Leave the drop-down menu set to Root to create a category at the top-most level.
  - Select the parent category to create a sub-category within a category.
4. Enter a name for the Category in the Enter the name of the new category field.
  5. Select an Access Type. Access type determines who can view the category on the UI. Access options are:

**Open** - All users can view/access.

**Restrict** - Only members of a usergroup can view/access. For more information, see [Restricting Access to Categories or Forums](#).

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

6. Select Create. Respond to the confirmation message.

## 5.12.2 Creating Forums

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

### Steps

1. At the JTF login, log in as the Oracle iSupport Administrator.
2. Navigate to Administration > Forum > Forum > Create. The Create New Forum window appears.

3. From the drop-down list, select the category within which you wish the forum to reside.
4. Enter a name for the forum in the Enter forum name field.
5. Select an Access Type:
  - Open** - All users can view/access.
  - Restrict** - Only members of a usergroup can view/access. For more information, see [Restricting Access to Categories or Forums](#).
  - Close** - This option closes the category or forum to all users except the Oracle iSupport administrator. It can be utilized as a temporary state for a category or forum while the administrator is performing maintenance or setup tasks relating to the category or forum. It can also be used to permanently disable a category or forum.
6. Select Create. Respond to the confirmation message.

### 5.12.3 Restricting Access to Categories or Forums

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

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**Note:** Restricted categories and forums do not appear 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.

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#### 5.12.3.1 Set Restricted Access on Category or Forum

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

##### Prerequisite

A category or forum has been created.

##### Steps

1. Log in to the JTF login window as the Oracle iSupport 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 appears for either forums or categories.
4. In the Modify Access Status page, select the category or forum you wish to restrict.
5. In the Choose access type area, select the Restricted radio button.
6. Select **Next** or **Modify**, depending upon which button appears. Respond to the confirmation message.

### 5.12.3.2 Create Usergroup

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

#### Steps

1. Log in to the JTF login window as the Oracle iSupport 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 `fnf_user` table.

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

8. Select Save.

### 5.12.3.3 Running Usergroup Creation Program

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

### 5.12.3.4 Associate Usergroup to Restricted Category/Forum

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

#### Prerequisites

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

#### Steps

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

## 5.12.4 Creating Forum Moderators

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

#### Forum moderators can:

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

#### Forum moderators cannot:

- Change access type of a category or forum
- Set up usergroups for restricted categories or forums

- Create forums or categories
- Move message threads from one forum to another

Steps for creating forum moderators are below. See the *Oracle iSupport User Guide* for more information on typical forum moderator tasks.

### **Steps**

1. Log in to the JTF login window as the Oracle iSupport 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 window appears.
5. Select the Add button under Moderator List area. The Add Moderator window appears.
6. Enter the name of the user who will be the Forum moderator.  
If necessary, search for the user:
  - a. Enter partial search criteria, using % as a wildcard
  - b. Select the radio button next to the appropriate username
7. After you have entered the appropriate name in the textbox, select Add. A confirmation message appears.

## **5.13 Setting Up Oracle iSupport Surveys**

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

### **5.13.1 Setting Up Oracle Scripting**

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

Oracle Scripting consists of the following components:

- **Scripting Engine** - The simple graphical user interface that displays a script at an agent's workstation via a browser or within an Oracle Window.
- **Scripting Author** - A script and survey development studio which is downloaded to a user's workstation. Scripting Author uses visual layouts to allow a script developer to create, modify, and deploy scripts for agents at the interaction center.
- **Survey Component** - An HTML user interface providing web-based surveys that can be deployed on the Internet, via email messages or direct links on enterprise web sites. The survey component contains all the tools needed to manage lists, set up survey campaigns, and provide result information.

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

### 5.13.2 Create Surveys in Oracle Scripting

Oracle iSupport 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*, *Oracle Scripting User Guide*, and the *Oracle Scripting Developer's Guide*.

### 5.13.3 Assign Survey Administrator Responsibility to an Oracle iSupport User

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

#### Steps

1. Log into Oracle iSupport as the Oracle iSupport Administrator.
2. Select Administration > User. Search for the user who will be the Survey Administrator, whether this is you as the Oracle iSupport Administrator or another user. Select the underlined hyperlink of the username.
3. In the Personal Profile Screen, select Responsibilities.
4. In the Responsibilities window, select the underlined hyperlink of the word, *Select*. A list of responsibilities appears. If necessary, search for the Survey Administrator responsibility. After you find it, select the Survey Administrator responsibility.

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

5. Save your work.

### 5.13.4 Set Up Oracle 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 iSupport, 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 window, select Create.
3. In the Create Resource window, create a Header page, a Final page, and an Error page according to the steps and guidelines documented in the *Oracle Scripting User Guide*, with the following exception:
  - Be sure to enter **ibupfbg1.jsp** in the File Name field for the Final page file. This is the Oracle iSupport JSP which lists the surveys you set up.
4. Navigate to Survey Campaign > Survey Campaign. Select Create.
5. In the Create Survey window, 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 User Guide*, 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 User Guide*.
  9. Navigate to Survey Campaign > Deployment and create a deployment for the survey by following the steps and guidelines documented in the *Oracle Scripting User Guide*.
  10. Deploy the survey by clicking on the Deploy button. Oracle iSupport will only display surveys which have the status of Active and whose dates fall within current dates. See the *Oracle Scripting User Guide* for additional information.

### 5.13.5 Make Survey Available in Oracle iSupport

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

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

#### 5.13.5.1 Set Up Usergroup

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

#### Steps

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

You can also end date a usergroup to disable it.

6. Enter a brief description for the usergroup in the Description text field.
7. In the SQL statement field, enter an appropriate SQL statement.

#### **Sample SQL Usergroup Select Statement**

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

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

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

8. Select Save.

### **5.13.5.2 Run Usergroup Creation Concurrent Program**

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

### **5.13.5.3 Select Survey and Usergroup to Associate to Survey**

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

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

## **5.13.6 View Survey Results**

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

### Steps

1. Log in to iSurvey as a user with Survey Administrator responsibility.  
From Oracle 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 User Guide* to view and manage your survey results.

## 5.14 Setting Up Oracle iSupport Web Call-Back

The Web Call-Back (Call Me) feature allows users to submit a call-back request via the Oracle iSupport 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 iSupport. For more information, consult the CRM Interaction Center documentation available on [OracleMetaLink](#).

Outside of Oracle iSupport, the call routing process is essentially this: After the call-back entry is made by the user, Oracle iSupport sends the request to the CCT server group specified by the Oracle iSupport Administrator on the Oracle iSupport 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 window in Oracle Customer Care.

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

After the CCT and UWQ applications and call center hardware are installed and implemented, you can use the steps below to set up Call Me in Oracle iSupport.

### Steps

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

## 5.15 Setting Up Contracts Applications

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

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

- *Oracle Contracts Core User Guide*
- *Oracle Contracts for Service User Guide*

## 5.16 Setting Up Customer Care

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

## 5.17 Setting Up Page-Level Look and Feel

An administrator can configure the look and feel of Oracle iSupport JavaServer Pages (JSPs) for different users without customizing these pages directly. This is accomplished by putting customized material in the top, left, right, and bottom sections of the original content pages that Oracle supplies. Oracle provides functions that you use to associate your own JSPs with each section of a given Oracle iSupport page. Then such a page dynamically includes your pages in a user's browser. Refer to [Appendix C](#) for the table of pages that you can configure in this way together with their corresponding functions.

## 5.17.1 General Steps to Perform JSP Configuration

Here are the general steps to configure the high-level look and feel of a content page.

### Steps

1. Determine what you want to appear in the four regions around an Oracle iSupport content page. Regions can be intentionally left blank. If they are blank, then the content region expands into blank regions.
2. Write the JSP that will provide the intended output. Probably write some simple HTML to test the configuration framework to see if the output is placed correctly. Pay attention to have matching end tags for all starting tags, especially for <table>, <tr>, and <td>. A mismatch of tags results a misplacing of the different regions in the standard user interface. Refer to table [Table C-2](#) for variables that you can use in customizing a JSP.
3. Determine in which page or pages to place the custom JSP. Each page in Oracle iSupport has four sections corresponding to four different function names.
4. Map the functions for the content page to the corresponding customized JSPs that you created. Refer to [Section 5.17.2](#) for details of this step.
5. Map the menu IBU\_DEFAULT\_CONFIG\_MENU to the menu corresponding to the responsibility to which you want to expose a custom JSP. Refer to [Section 5.17.3](#) for details on how do to this.

The reason for this step is responsibility security. Responsibilities can show or not show a custom JSP by having a different configuration menu. For example, IBU\_GUEST\_CONFIG\_MENU can contain several functions and can be attached to the menu corresponding to a guest user. A business use, for example, does not see a custom JSP that is tied only to a guest user.

6. Make sure that the functions that correspond to the custom JSPs are not part of excluded menu items. In the responsibility window, assure that none of the functions that correspond to a custom JSPs are in the excluded item table.
7. Copy your customized JSP into the \$OA\_HTML directory, which was established when the configuration files for your web server were set up. This is the location where the process looks to find customized JSPs.
8. Restart your web server, navigate to the page that has a customized JSP, and check the result.

## 5.17.2 Mapping Customized JSPs to Customizing Functions

Use this procedure to map your customized JSPs to regions of a content page in order to alter the high-level look and feel of that page.

### Steps

1. Using the Forms mode and the Application Developer responsibility, navigate to Application > Function. The Form Functions window appears.
2. Using [Appendix C](#), determine the functions that correspond with the page sections that you want to customize.
3. In the Description tabbed page, query for these functions. The results populate the window, including the Web HTML tabbed page.
4. In the Web HTML tabbed page, in the HTML Call column, enter the name of your customized JSP that corresponds with each listed function. Include ".jsp" in the name.
5. Save your work.

## 5.17.3 Mapping Page-Level Configuration Functions to Responsibilities

For a custom JSP to adjust the high-level look and feel of a content page, the mapping function for the JSP must be in the menu corresponding to the responsibility to which you want to expose the custom JSP. You can add functions individually, but often a more efficient way is to map the menu IBU\_DEFAULT\_CONFIG\_MENU or a variant of this menu. This is the case because IBU\_DEFAULT\_CONFIG\_MENU is associated with full access and thus already contains all the configuration functions. As an example of mapping, the seeded responsibility iSupport Business User has the seeded menu IBU\_BUS\_USER\_TOP\_MENU. You must attach IBU\_DEFAULT\_CONFIG\_MENU to IBU\_BUS\_USER\_TOP\_MENU for a custom JSP to appear. Use this procedure to map IBU\_DEFAULT\_CONFIG\_MENU to the menu for a responsibility.

### Steps

1. Using the Application Developer responsibility, navigate to Application > Menu. The Menus window appears.
2. Use the Menu or User Menu Name fields to query for the name of the menu that is associated with the responsibility to which you want to expose a custom JSP.

3. Create a new sequence line with `IBU_DEFAULT_CONFIG_MENU` in the Submenu field. Doing so calls in the functions in this menu. Leave the Prompt field blank because normally you do not want a user to see the function list.
4. Save your work.

## 5.18 Setting Up Custom Menus

Oracle iSupport is fully integrated with the Custom Menu feature of the JTT tech stack. You can write a new menu renderer by implementing a JTT custom menu class and associating it with different Oracle iSupport responsibilities. Thus you can create a different menu look and feel for different users. For details and sample code, refer to JTT developer documentation, which is in process for release on *OracleMetalink*.

## 5.19 Verifying the Implementation

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

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# Verifying the Implementation

This chapter contains steps to verify the successful implementation of Oracle iSupport. Topics include:

- [Implementation Verification Overview](#)
- [Verifying Homepage Implementation](#)
- [Verifying User Setups](#)
- [Verifying Service Request Implementation](#)
- [Verifying Products and Returns Integration](#)
- [Verifying Forums Implementation](#)
- [Verifying Knowledge Management Implementation](#)

## 6.1 Implementation Verification Overview

Following are brief guidelines to verify the successful installation of the major functional areas of Oracle iSupport.

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

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

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

## 6.2 Verifying Homepage Implementation

Verify that you have set up the Oracle iSupport Homepage.

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

**References:** [Setting up iSupport Homepage](#) in the *Implementation Tasks* chapter of this guide.

## 6.3 Verifying User Setups

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

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

**References:**

- [Setting up iSupport Users](#) in the *Implementation Tasks* chapter of this guide

- CRM User Management Framework documentation (available online)

## 6.4 Verifying Service Request Implementation

Verify that you have set up service request functionality in Oracle iSupport.

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

### References:

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

## 6.5 Verifying Products>Returns Integration

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

### **6.5.0.1 Products (Products tab)**

Verify the following:

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

#### **References:**

- [Integrating Oracle iSupport with Products and Returns](#) chapter in this guide
- *Oracle Install Base Implementation Guide*
- Oracle Inventory documentation

### **6.5.0.2 Returns (Accounts tab)**

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

### **6.5.0.3 Account Management (Accounts tab)**

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

#### **References:**

- [Integrating Oracle iSupport with Products and Returns](#) chapter in this guide
- Oracle Contracts documentation
- Oracle Accounts Receivable and other financial products documentation

## 6.6 Verifying Forums Implementation

Verify the setup of the Forums functionality.

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

### References:

- [Setting up iSupport Forums](#) in the *Implementation Tasks* chapter in this guide

## 6.7 Verifying Knowledge Management Implementation

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

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

8. Create a Statement, add Attachments, and add Comments.
  9. View and search Work Pending Solutions.
  10. Accept or reject a solution in the workflow.
  11. Run Concurrent Programs.
3. Verify that you can perform the following steps:
    1. Add or update frequently used definitions for solutions.
    2. Set up recommended solutions.
  4. Verify that you can perform the following steps:
    1. Basic Search
    2. Advanced Search
    3. Searching for a Statement

**References:**

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

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# Integrating Oracle iSupport with Service Request

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

Topics in this chapter include:

- [Overview of Service Request Functionality in Oracle iSupport](#)
- [Overview of Dependencies](#)
- [Overview of Setup Steps](#)
- [Setting Up Oracle TeleService](#)
- [Setting Up Notes](#)
- [iSupport Service Request Setups](#)
- [Testing/Verification of Basic Setup](#)
- [Products in iSupport Service Request](#)
- [Knowledge Management in iSupport Service Request](#)
- [Setting up E-Mail Submission of Service Request Details](#)

## 7.1 Overview of Service Request Functionality in Oracle iSupport

The main features of service request functionality in Oracle iSupport are:

- Customizable templates for gathering information from users during request creation.

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

## 7.2 Overview of Dependencies

Oracle TeleService provides the bulk of the service request functionality in Oracle iSupport. Oracle TeleService tracks all service issues reported by customers and employees of the merchant. It does this through agent and customer input and integration with other Oracle applications.

In addition to the dependency upon Oracle TeleService, other service request functionality within Oracle iSupport can be highly dependent upon additional applications, depending upon the features you elect to implement. These other applications include:

- Oracle Workflow for processing e-mails.
- Oracle Inventory and Oracle Install Base for products data.
- The following Oracle Common Application Components:

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

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

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

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

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

## 7.3 Overview of Setup Steps

In order to use the service request functionality of Oracle iSupport, you must:

- Set up the Oracle TeleService application, which supplies the base functionality. See [Setting up Oracle TeleService](#).
- Set up the Notes module, which allows the capture of textual information in service request functionality. See [Setting up Notes](#).

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

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

## 7.4 Setting Up Oracle TeleService

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

### 7.4.0.1 Define Service Request Status Codes

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

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

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

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

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

### 7.4.0.2 Define Status Code Transition Rules

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

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

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

#### Prerequisite

- Status Codes have been set up.

#### Steps

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

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

### 7.4.0.3 Set Up Service Request Types

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

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

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

#### Prerequisites to Setting Up Service Request Types

- Set up your Status Codes.

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

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

#### **7.4.0.4 Map Service Request Types to Responsibilities**

You can control what service request types can be shown to a user based on his current responsibility for service request creation. A single responsibility can be mapped to multiple service request types. A service organization can utilize this feature to present different service request types to customers and to employee users of the service organization based on their responsibility.

You can enable this mapping in Oracle iSupport by using the system profile option Oracle iSupport: Enable Responsibility and Type Mapping.

For more information on mapping service request types to responsibilities, see the *Oracle TeleService Implementation Guide*.

#### **7.4.0.5 Map Problem Codes**

You can control what problem codes are presented to a user while creating a service request based on his selection of service request types and product combination. A service organization can utilize this feature to show related problem codes for a service request type or a product or a combination of a product and service request type to a user when he is creating a service request for accurate problem capture.

You can enable this mapping in Oracle iSupport by using the system profile option Oracle iSupport: Enable Request Type, Product, and Problem Code Mapping.

For more information on mapping problem codes, see the *Oracle TeleService Implementation Guide*.

#### **7.4.0.6 Set Up Service Request Severities**

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

## Prerequisite

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

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

### 7.4.0.7 Set Up Notifications

You can set up Oracle TeleService to automatically notify a service request owner and customer contacts associated with the service request whenever a certain event occurs, for example, whenever a service request is created, closed, reassigned, or changed. Notifications can be sent by Oracle Workflow notifications or by e-mail.

Oracle TeleService includes a notification workflow and notification templates suitable for different types of events, but implementers must set up the rules that trigger the workflow.

The rules make it possible to selectively notify users only about events of interest to the organization. This notification functionality enhances and replaces notifications through the Call Support Process workflow that can be associated with service request types. The Call Support Process notifies users each and every time a service request is updated.

For more information on setting up notifications, see the *Oracle TeleService Implementation Guide*.

### 7.4.0.8 Set Up Service Request Urgencies

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

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

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

#### **7.4.0.9 Set Up Service Request Problem Codes**

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

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

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

#### **7.4.0.10 Set Up Service Request Resolution Codes**

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

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

#### **7.4.0.11 Set Up Oracle TeleService Profile Options**

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

## **7.5 Setting Up Oracle Notes**

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

See the *Oracle Common Application Components Implementation Guide* for more information.

### **7.5.1 Set Note Types as Public to View in Oracle iSupport**

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

## 7.5.2 Restrict Note Types Viewed in Oracle iSupport

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

### Prerequisite

- Note types have been set up.

### Steps

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

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

## 7.6 Setting Up Service Request in Oracle iSupport

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

- [Set up iSupport Service Request Profile Options](#)
- [Set up Service Request Defaults](#)
- [Set up Service Request Templates](#)

## 7.6.1 Set Up iSupport Service Request Profile Options

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

## 7.6.2 Set Up Service Request Defaults

In the Request Management window, Oracle iSupport administrators can control the following service request default settings:

- List of Values defaults in the Create Service Request window
- 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 TeleService has been installed and configured. See *Oracle TeleService Implementation Guide* for details.

### Steps

1. At the JTF login, log in as the Oracle iSupport Administrator.
2. Navigate to Administration > Support > Request Management > General. The Request Management Administration window appears.
3. In the Request Management Administration window, set defaults for the following:
  - **Default Severity** - Default Severity for new Service Requests.
  - **Default Status** - Set a Default Status for new Service Requests. The Default Status is the status assigned to the Service Request at creation.
  - **Closed Status** - From the Closed Status list, set a default for closed Service Request.
  - **Default Create Notetype** - Set a default for the notetype used when a Service Request is created.

- **Default Update Notetype** - Set a default for the notetype used when a Service Request is updated.
- **Default Escalate Notetype** - Set a default for the notetype used when a Service Request is escalated.
- **Default Closed Notetype** - Set a default for the notetype used when a Service Request is closed.
- **Default Resource Type** - From the Default Resource Type list, set the default resource type. This indicates the resource type associated with the Default Resource ID (see below).
- **Default Resource ID** - From the Default Resource ID list, set the person/group who will be the default resource for Service Request routing.
- **Reopen SR Time Limit** - Set the timeframe in hours during which a closed Service Request can be opened.

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

#### **Enable Template:**

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

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

#### **Search Knowledge Base:**

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

#### **Enforce Product Selection:**

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

5. When finished, select Update.

## 7.6.3 Set up Service Request Templates

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

- Administrator-defined questions that gather information about service requests; these questions can be configured so that the user is required to answer them.
- Administrator-defined free-form and choice-type answers that relate to the questions posed on the template.
- Weighting of choice-type answers used to determine severity of service requests automatically.
- Ability to associate a template with a specific product and/or urgency.
- Short codes which assist in characterizing and routing the service requests.

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

The information gathered from the templates assists in:

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

This topic area includes:

- [Creating New Templates](#)
- [Selecting Effective Dates for Templates](#)
- [Associating Products with Templates](#)
- [Associating Urgencies with Templates](#)
- [Defining Questions/Answers on Templates](#)
- [Defining Severity Thresholds for Templates](#)
- [Setting up a Default Template](#)

### 7.6.3.1 Creating New Templates

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

#### Steps

1. Log in to the JTF login as Oracle iSupport Administrator.

2. Navigate to Administration > Support > Request Management > Template. The Service Request Template Administration window appears.
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 this release of Oracle iSupport, the Short Code field is non-functional, but it is recommended that you use it so that when it is utilized in a future release, existing templates will already be using it. In a future release, the short code will help route service requests. The short code is not exposed to end users.

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

Renaming the template and altering the Short Code can be done here as well.

8. Select Update. A confirmation message appears.
9. Next, associate the template with a product. Select the underlined hyperlink of the appropriate template. The Modify Template window appears.
10. In the Associate Attribute, Attribute to Associate: Product area, select Modify. The Associate Product window appears.
11. From the Available Product list, select the desired association(s) and use the right (>) arrow button to move them to the Associated Product column. Select Update and then Back (bottom of window) to return to the Associate Attribute area of the Modify Template window.
12. Next, associate an urgency to the template. Select the underlined hyperlink of the appropriate template. The Modify Template window appears.
13. In the Associate Attribute, Attribute to Associate: Urgency area, select Modify. The Associate Urgency window appears.

14. From the Available Urgencies list, select the desired association(s) and use the right (>) arrow button to move them to the Associated Urgencies column. Select Update and then Back (bottom of window) to return to the Associate Attribute area of the Modify Template window.
15. Next, define questions and answers for the template. Select the underlined hyperlink of the appropriate template. The Modify Template window appears.
16. **Set up Questions on Template:** In the Modify Template window, 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.
17. Select Answer Type: You have two options for Answer types:
  - **Choice** - This is a pick-list type answer and can be used in scoring. Scoring is used for determining the Severity of the Service Request.
  - **Free Text** - This is a free-form answer; you can specify the number of lines allowed for the answer (see below). This answer cannot be used in scoring.
18. If your question requires a Choice-type answer, select whether you wish the answer to be used in scoring/weighting when determining severities for submissions which use this template (see Set Severity Thresholds below). Answers to the question will be weighted from 1 to 9 during the Answer setup (see Set up Answers for a Choice Question below).
19. To enforce that the user is required to answer the question, select Yes in the Response Required field. Mandatory questions force the user to provide an answer before the application will continue creating the request. To make the question optional for the end user, choose No.
20. Select Add. The window refreshes, with the question appearing as an underlined link in the Template Detail area.
21. To sort the questions, select Sort and use the up and down arrows in the Sort Questions window to arrange the questions in the desired order. Use the back button to return to the Modify Template page.
22. Optionally, to edit a question, click on the hyperlink of the question you wish to modify.
23. **Set up Answers for a Choice Question:** In the Template Detail area, click the underlined hyperlink of a question. The Define Question and Answer window appears.
24. Enter an answer for the question in an empty textbox.

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

25. For each Choice-type answer, set a value of 1-9. After the end user answers the questions, the application will add up these values and the final score will be used to determine the severity of the Service Request, based on the Severity Thresholds you set (see below).
26. For Text-type questions, you will not need to determine answers. Instead, in the Define Question and Answer window, select the number of rows the user will be limited to when answering.
27. Select Update to save changes, and Back to return to the previous window.
28. Next, set up severity thresholds for the template. Select the underlined hyperlink of the appropriate template. The Modify Template window appears.

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

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

**Note:** You do not need to define thresholds for all of your severities, only the ones you wish to use. Also: You can select one of the severities as a default and all templates use that severity. Severities for which you do not define thresholds are 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) versus a total possible score (10). The percentage in this case is be 50%. Then, based on the severity thresholds you set (see the example below), the application determines the severity (e.g, high, medium, low). Here are the thresholds set for this example:

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

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

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

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

### 7.6.3.2 Setting Up a Default Template

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

Only one default template is allowed.

#### Prerequisites

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

#### Steps

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

## 7.7 Setting Up Products

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

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

## 7.8 Using Knowledge Management in iSupport Service Request

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

See the *Oracle Knowledge Management Implementation Guide* for more information.

## 7.9 Setting Up E-mail Submission of Service Request Details

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

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

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



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# Integrating Oracle iSupport with Products and Returns

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

- [Understanding Integration with Products and Returns](#)
- [Setting Up Oracle Inventory](#)
- [Setting Up Oracle Bills of Materials](#)
- [Setting Up Oracle Install Base](#)
- [Enabling Returns Functionality](#)

## 8.1 Understanding Integration with Products and Returns

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

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

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

The applications that integrate with Oracle iSupport and provide products repository and returns functionality include:

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

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

## 8.2 Setting Up Oracle Inventory

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

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

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

## 8.3 Setting Up Bills of Materials

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

BOM is an optional integration with products and returns functionality in Oracle iSupport.

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

## 8.4 Setting Up Oracle Install Base

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

Oracle iSupport uses Oracle Install Base for:

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

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

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**Note:** When setting up new users of the Oracle Install Base functionality, please add the role, CSI\_END\_USER to them. This role contains the required permissions for Install Base general users.

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## 8.5 Enabling Returns Functionality

The following applications and relevant dependencies are necessary for returns functionality in Oracle iSupport:

- Oracle Order Capture APIs
- Oracle Order Management

### 8.5.1 Understanding Returns in Oracle Order Management

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

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

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

Examples of returns supported by Oracle Order Management:

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

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

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

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

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

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

### **Process Flow:**

1. Create an RMA in Oracle iSupport.
2. Book the RMA into Oracle Order Management through Oracle Order Capture API.
3. Receive the RMA using the Receipts form of Oracle Purchasing.
4. Check the on-hand quantity of the item in inventory to verify that the correct quantity was received.
5. Fulfill the RMA line.
6. Generate a credit memo in Oracle Invoicing.

7. View the credit memo in Oracle Order Management.
8. Check the Shipped and Fulfilled quantity on the RMA line.

## 8.5.2 Understanding Returns in Oracle iSupport

Oracle iSupport allows users to create a return by providing a UI that calls Oracle Order Capture APIs to submit the return to Oracle Order Management and perform customer validation. Oracle iSupport does not create the return to Oracle Order Management directly.

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

For this release of Oracle iSupport, iSupport only supports RMA with Receipt and Credit.

### Process Flow:

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

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

5. The page calculates the credit amount for the user; this is the amount of the order line. The ordered amount is the net selling price per unit multiplied by the quantity ordered.
6. Having selected a valid order item and quantity, the user clicks Create Return, and Oracle iSupport submits the return to Oracle Order Management through the Oracle Order Capture API. If the return submission is successful, then the user receives an RMA number. If Oracle Order Management/Oracle Quoting return any errors, then Oracle iSupport captures and displays them on the next page. When the return is booked, the same order line cannot be returned twice.
7. After creation of the return from Oracle iSupport, the return is handled by Oracle Order Capture API, Order Management, Oracle Purchasing, Workflow APIs, Oracle Inventory (or Oracle Install Base), Oracle Accounts Receivable, and Oracle Invoicing.

### 8.5.3 Setting Up Oracle Quoting

Set up Oracle Quoting according to the latest *Oracle Quoting Implementation Guide*. This enables access to the Order Capture APIs that are required for returns functionality in Oracle iSupport.

#### 8.5.3.1 Returns Profile Options

The following profile options must be set to allow returns functionality in Oracle iSupport:

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

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

### 8.5.4 Setting Up Oracle Order Management

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

- Oracle Order Management - required for returns in Oracle iSupport
- Oracle Shipping Execution (SE) - required for returns in Oracle iSupport
- Oracle Pricing

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

- Oracle Advanced Pricing - required for returns in Oracle iSupport
- Oracle Configurator
- Oracle Accounts Receivable - a dependency for general Oracle iSupport setup
- Oracle Advanced Planning and Scheduling

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

#### 8.5.4.1 Set Up Transaction Type Line Types

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

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

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

#### Steps

1. Log in to Oracle Forms; select Order Management super user or administrator responsibility.
2. Navigate to Setup > Transaction Types > Define. The Transaction Types window displays.
3. Query for **Mixed** (you must enter the word exactly as shown here) in the Transaction Type field. (Use F11 and Ctrl +F11 to query.) The Transaction Types window populates with the information for the Mixed transaction type.
4. Place the cursor in the Order Category field and select an Order Category of Mixed.
5. Place the cursor in the Default Return Line field and select a Default Return Line Type of **Return (Receipt)**.

6. Place the cursor in the Default Order Line Type field and select a Default Order Line Type of **Standard (Line Invoicing)**.
7. Access the Line Workflow Assignments window by selecting the **Assign Line Flow** button.
8. In the Access the Line Workflow Assignments window, add a new record.
9. In the Set Line Type field, select **Standard (Line Invoicing)** from the LOV.
10. Select an appropriate Item Type to populate the Item Type field.
11. In the Set Process Name field, select **Line Flow Generic** from the LOV.
12. Select an appropriate Start Date.
13. Add a second record.
14. In the Set Line Type field, select **Return (Receipt)** from the LOV.
15. Select an appropriate Item Type to populate the Item Type field.
16. In the Set Process Name field, select **Line Flow Return for Credit with Receipt**.
17. Select an appropriate Start Date for the record.
18. Select Ok. Save the changes.

### 8.5.5 Guidelines

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

## 8.5.6 Troubleshooting Returns in Oracle iSupport

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

### Steps

1. Inside the database, one of the v\$parameter, `utl_file_dir`, needs to be set to the debug file directory. Specify the correct directory in the `init.ora` file to set this.
2. Ensure the settings on the following Oracle Order Management (OM) and Order Quoting (ASO) profile options:
  - OM: Debug Level
  - OM: Debug Log Directory - This directory needs to be the same as the directory pointed to by `utl_file_dir` above.
  - ASO: Enable ASO Debug - Set to Yes.

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

## 8.5.7 Set Up Oracle Advanced Pricing

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

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

## 8.5.8 Set Up Oracle Shipping

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

Refer to *Implementing Oracle Shipping* for setup details.

## 8.5.9 Set Up Oracle Purchasing

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

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



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# Integrating Oracle iSupport with Oracle Knowledge Management

This chapter addresses Oracle iSupport's integration with the Oracle Knowledge Management application.

## 9.1 Overview of Oracle Knowledge Management

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

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, thus helping companies compete in the marketplace.

For users of Oracle iSupport, Oracle Knowledge Management is important to browse, search, and write technical content. Usually the Oracle iSupport administrator is set up with the capability to perform the functions of the Oracle Knowledge Management administrator.

For more information on Oracle Knowledge Management, see the *Oracle Knowledge Management User Guide* and the *Oracle Knowledge Management Implementation Guide*.



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# Integrating Oracle iSupport with Oracle Workflow

Oracle iSupport integrates with Oracle Workflow to provide e-mail submission and other workflow processes.

Topics in this chapter include:

- [Oracle Workflow Overview](#)
- [Overview of Oracle Workflow Functionality in Oracle iSupport](#)
- [Setting up Oracle Workflow](#)

## 10.1 Oracle Workflow Overview

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

- Workflow Client (Workflow Builder)
- Workflow Server

The sections below provide an overview of these two tiers.

### 10.1.1 Workflow Client

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

## 10.1.2 Workflow Server

The Workflow Server consists of the following elements:

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

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

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

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

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

Message Delivery Scheduler Concurrent Program:

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

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

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

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

## 10.2 Overview of Oracle Workflow Functionality in iSupport

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

### 10.2.1 Service Request

Oracle iSupport features the ability to create, update, and track service requests. It does this through integration with 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 window in Oracle TeleService. 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 iSupport also uses Oracle Workflow to submit service request details to users. This is done via the *Email this to me* button during service request creation.

For more information, see:

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

### 10.2.2 Returns

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

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

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

### 10.2.3 Homepage Subscription E-mails

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

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

### 10.2.4 Knowledge Management

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

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

### 10.2.5 User Approvals

The approvals notifications used in the Oracle User Management Framework are dependent upon Oracle Workflow. The workflow notifications provide e-mails to

user approvers notifying them that they have users in the queue waiting to be approved. Workflow also sends e-mails to users notifying them that they have been approved for an application. For more information, see the *Oracle Common Application Components Implementation Guide* and the *Oracle Common Application Components User's Guide*.

## 10.3 Setting up Oracle Workflow

Refer to the *Oracle Workflow Guide*.



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## Diagnostics and Troubleshooting

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

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

### 11.1 Stop/Start Apache (Bounce) Server after Patching

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

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

### 11.2 Java/HTML Stack Errors

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

- [Understanding JSPs and Server Cache](#)
- [Where are E-Commerce Cookies Stored?](#)
- [JspCompileException](#)
- [NoSuchMethod](#)
- [java.lang.nullpointerException](#)
- [JTF-0198](#)

### 11.2.0.1 Understanding JSPs and Server Cache

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

### 11.2.0.2 Where are E-Commerce Cookies Stored?

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

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

## 11.2.1 JspCompileException

### Problem Description

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

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

```
Exception:oracle.jsp.provider.JspCompileException:
```

```
Errors compiling:e:\oracrm\viscomn\html\_pages\_oa__html\_jtfasuf.java:706
```

```
Incompatible type for method. Can't convert into  
java.lang.Object.
```

```
params.put('companyid',ub.getCompanyPartyID());
```

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

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

### **Solution Description**

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

## **11.2.2 NoSuchMethod**

### **Problem Description**

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

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

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

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

## 11.2.3 JTF Login Page Errors

### Problem Description

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

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

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

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

### Solution Description

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

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

1. Select `* from fnd_application_servers`:

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

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

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

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

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

### Summary

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

## 11.2.4 java.lang.nullPointerException

### Problem Description

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

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

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

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

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### Summary

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

## 11.2.5 JTF-0198

### Problem Description

You receive the error, `JTF-0198`.

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

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

### Solution Description

To resolve this error, use the following steps.

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

For domains that do not belong to the global internet (i.e., private intranets) the session\_cookie\_domain field in ICX\_PARAMETERS table must be set to the correct domain. If the domain does not belong to the global internet, the preferred value for the session\_cookie\_domain field in ICX\_PARAMETERS table is null.

2. Change the value of the JTF Property cookie name in one of the systems. Stop all browser sessions and clean browser cookie files.

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

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

### Summary

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

## 11.3 How to Find Responsibility ID Values

The following steps describe how to find the RESPONSIBILITY\_ID value of a responsibility.

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

## 11.4 Debugging Oracle iSupport Returns Functionality

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

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

## 11.5 Customizing Oracle iSupport Quick Find Menu

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

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

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

## 11.6 Oracle iSupport Administration FAQs

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

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

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

#### 11.6.0.1 How do I customize Oracle iSupport?

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

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

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

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

The bin is generated from the IBU\_HELP\_BIN package, get\_html procedure.

#### 11.6.0.3 Does Oracle iSupport support different languages?

Yes. Oracle iSupport is NLS and MLS compliant.

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

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

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

#### 11.6.0.4 Can users renew a contract through Oracle iSupport?

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

### **11.6.0.5 What is the relationship between iSupport and TCA?**

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

For example, the trading community of an appliance manufacturer may include suppliers, distributors, resellers, retailers, service providers, individual consumers, and business consumers. The appliance manufacturer not only wishes to track relationships between itself and other entities within the trading community, the manufacturer may also be interested in relationships that other community members have with each other. The manufacturer may not even have direct relationships with all the members of its trading community. But, it is important that the appliance manufacturer know about these entities and how they relate to other entities within the community.

In summary, there is only one customer data model/schema used both by ERP and CRM. The 11i Customer Model is not a product that can be purchased. Rather, it is the underlying data model that stores customer information and is included with any CRM or ERP application. All CRM modules utilize the Customer Model to store customer information, although the degree to which the Customer Model is utilized differs from module to module.

### **11.6.0.6 What is the significance of the account number in iSupport?**

The account number represents a customer's financial record/account. In Oracle iSupport, an account number is required to create a service request. Also, all real-time accounts inquiries in Oracle iSupport are based on the account number.

B2C (individual) customers are assigned account numbers automatically by the system when they register. Customers can view their account numbers by navigating to the Profile screens (Profile > Accounts).

B2B (business) users can be assigned multiple accounts during or after registration approval. Account assignments are made on the JTF sysadmin console by a B2B user's primary user or merchant administrator. B2B users can view their account numbers and set a default account number in the Profile screens (Profile > Accounts).

**11.6.0.7 How do users reset their passwords?**

Access the user's profile information (Profile > Personal Profile) and enter a new password. Select Update on the page to save changes.

**11.6.0.8 What type of users can change their first and last names in the Personal Profile?**

B2B and B2C users can change their first and last names, but employee users cannot.

**11.6.0.9 What type of users can see company profile information?**

B2C users and employee users cannot see company profile information in the profile screens. The company information is applicable only to B2B users, and is contained in the TCA.

**11.6.0.10 What causes permission errors under the Profile menu?**

Users need IBU\_PROFILE\_VIEW or IBU\_PROFILE\_UPDATE permissions to view and update their profile pages.

**11.6.0.11 Why would a user not be able to see the side menus in the profile screens?**

Users need the seed data for JTF\_USER\_PROFILE\_TYPE to access these menus.

**11.6.0.12 What if I am a primary user who can see other companies' information?**

If this occurs, check the roles (collections of permissions) assigned to you. Most likely, you have been assigned a role that contains one of the following permissions:

- IBU\_USER\_MGMT\_VIEW\_ALL\_COMPANY
- IBU\_USER\_MGMT\_VIEW\_ALL\_ROLE

These two permissions should only be given to an administrator who has the privilege to view information across companies.

**11.6.0.13 How can a user's address information be changed?**

The application administrator or primary user can change the addresses and contact points (phone, fax, e-mail data) of a user by searching for the user in the administration screens, selecting the underlined hyperlink of the username, and selecting the Profile button. From there, the administrator or primary user can

navigate to appropriate user information from the hyperlink menu to the left of the Profile screens.

Users themselves can select the Profile button to access and change their address and contact points information.

#### **11.6.0.14 What if I have removed a permission from a role and now I want to restore the original values of the role?**

Re-run the driver that creates the permissions.

#### **11.6.0.15 How can a user add more than three attachments to a service request?**

On the service request creation window in Oracle iSupport, there are enough rows/blank entry areas to add only three attachments. If a user wishes to add more than three attachments to the service request, this can be done by going ahead and creating the service request, and then accessing the details of the service request. In the Service Request Details window, the user can add more attachments to the service request. Another way would be to zip (or compress or tar) the attachments into one file before attaching them to the service request.

#### **11.6.0.16 How does selecting a default responsibility for users on the iSupport UI work?**

A user can select a default responsibility from the Profile > Preferences menu. The next time the user logs in, the default responsibility chosen previously will be the default responsibility he logs in with. When the user selects the default responsibility, this overrides any default responsibility that the administrator has selected for the user. Conversely, if the administrator selects a default responsibility for the user from the Administration > Profile > Preferences menu, then when the user logs into the JTF login, the user will be logged in with the default responsibility chosen by the administrator. If a user logs in without a default responsibility having been set, then the user will be asked to choose from a list of responsibilities. This, however, can cause errors if the default responsibility the user selects in the prompt window is for a Forms-based product. To avoid problems ensure that all users always have at least one responsibility defined.

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## Profile Options

This appendix describes the profile option settings needed to implement Oracle iSupport. Topics include:

- [Before you Begin](#)
- [About User Profile Options](#)
- [How to Set Profile Options](#)
- [JTT Profile Options](#)
- [Oracle User Management Profile Options](#)
- [Oracle iSupport Profile Options](#)
- [Oracle Service Profile Options](#)
- [Returns Profile Options](#)
- [Knowledge Management Profile Options](#)
- [Miscellaneous Profile Options](#)

### A.1 Before You Begin

Before making Oracle Forms application settings, ensure that Oracle Forms application is up and running. All of the steps in this section require you to log onto Oracle Forms application with the sysadmin login.

### A.2 About User Profile Options

A user profile is a set of changeable options that affect the way Oracle applications appear and how they function. Oracle Applications uses a set of user profile options

that are common to all the applications. In addition, each module has its own unique set of user profile options.

For a complete list of profile options in the Oracle Application Object Library, see *Oracle Applications System Administrator's Guide*.

The system administrator sets user profile options at four levels that have a set hierarchy. From lowest level to highest, the profiles categories are:

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

Each user profile ordinarily exists at each level. For example, Oracle Applications provides a site-level Printer option, an application-level Printer option, a responsibility-level option, and so on. Oracle Applications enforces the level hierarchy to ensure that a higher-level option value overrides a lower-level value, with Site being the lowest and User the highest in the hierarchy. If, for example, you set your site-level Printer option to print to Printer 1, but your user-level Printer option is set to Printer 2, then printing occurs at Printer 2.

Site-level option values are generally set by the system administrator before profile options are specified at the other three levels. The options specified at site-level work as defaults until the same options are specified at the other levels.

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

### A.3 How to Set Profile Options

Use the following procedure to set any profile option.

#### Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Profile > System. The Find System Profile Values window opens.
3. Select the level(s) at which you wish to set the profile option.

- **Site**
  - **Application** - If you choose this level, from the Application LOV, select the application for which you wish to set the profile option.
  - **Responsibility** - If you choose this level, from the Responsibility LOV, select the responsibility for which you wish to set the profile option.
  - **User** - If you choose this level, from the User LOV, select the user for whom you wish to set the profile option.
4. In the Profile field, enter the a partial profile name followed by the percent sign as a wildcard. **Example:** %iSUPPORT%.
  5. Select Find. The System Profile Values window opens with the results of your search.
  6. Verify or set the profile option(s) at the levels that you selected.
  7. Save your work.

## A.4 Setting Oracle User Management Profile Options

The following is a list of profile options that affect the behavior of the Oracle (JTF) User Management module. Set these profile options at the site level according to your requirements.

For additional information on Oracle User Management, please see the *Oracle Common Application Components User's Guide*, (user management chapters) and *Oracle Common Application Components Implementation Guide* (setting up users section).

- **JTF\_UM\_APPROVAL\_URL** - Defines the absolute path of the login page (jtflogin.jsp) that an approver must go to in order to accept or reject a request. The URL is included in the workflow notification sent to each approver. The same URL is sent to the user after their request is accepted or rejected.
- **JTF\_UM\_MERCHANT\_NAME** - Defines the name of your organization. The workflow inserts this name into the request approvals and rejections when they are sent to the user.
- **JTF\_UM\_APPROVAL\_OWNER** - Set by default to sysadmin, this profile option is used in the approval process. If the last approver in a predefined approval definition fails to approve a request, the person defined in this profile option will be the escalation point of contact and will receive the request. The user specified as the value for this profile option must have the CRM\_HTML\_

ADMINISTRATION responsibility and the JTF\_REG\_APPROVAL and JTF\_SECURITY\_ASSIGN\_ROLE permissions.

- **JTF\_UM\_APPROVAL\_TIMEOUT\_MINS** - Defines (in minutes) how long a workflow notification remains in a queue before it is timed out. The default is 1440 (1 day). If you enter 0 as the value, no time out occurs. If no value is set, the profile option is defaulted to 0.

**Note:** The Process Timeout field in the parameters window when starting the JTF Approval workflow must be set to Yes for this profile option to take effect.

- **JTF\_REGISTRATION\_CACHE** - Determines whether the browser will cache the data entered by a user during the registration flow. The default value is Yes. If set to Yes and if the user presses the Back button, then the data entered on the previous page is available. If the profile option is set to No, then the data (page) expires as soon as the user leaves the page.
- **JTF\_PRIMARY\_USER** - Predetermines the username that corresponds with the Universal Primary User Approver.
- **JTF\_INDIVIDUALUSER\_ACCOUNT** - When set to Yes, this profile option creates a new account (in the HZ\_CUST\_ACCOUNTS table) for each individual user. It also associates the user with the corresponding account. Users must have an account in order to purchase products through Oracle iStore.

## A.5 Oracle Common Application Components (JTT) Profile Options

Several Oracle Common Application Components (JTT) profile options must be set for the Oracle iSupport UI to appear. The values of the JTT profiles set the basic JTT Foundation default elements and values. These profiles are seeded in the Profiles window in ERP, and values are defined by the user (as System Administrator).

These affect all users logged in with any responsibility that is associated with the application.

### Steps

1. Log on to Oracle Forms as sysadmin/sysadmin.
2. Select the System Administrator responsibility.
3. Navigate to Profile > System > Find System Profile Values window.
4. Query the system for JTF profile options:
  - a. Check the Application checkbox. Clear the Site checkbox, if necessary.

- b. Enter iSupport in the Application field.
  - c. In the Profile field, enter JTF\_PROFILE%, and select Find.
5. Verify and/or set the following JTF profile option for Oracle iSupport. Use the topic below, **Finding Responsibility ID and Application ID Values**, for assistance.
- **JTF\_PROFILE\_DEFAULT\_RESPONSIBILITY** - This value tells the system which responsibility to grant to users who are automatically approved by the system. This default responsibility ID is different in every instance. Use the following steps to find this value.

### Finding Responsibility ID and Application ID Values

Use the following steps to find the APPLICATION\_ID and RESPONSIBILITY\_ID value of a responsibility.

- a. Log in to the Oracle Forms application as sysadmin. Select System Administrator responsibility. Navigate to Security > Responsibility > Define. The Responsibilities window opens.
  - b. From the top menu, select View > Find. Search for the responsibility that you wish to be the default responsibility, highlight it, and click Ok in the search window. The Responsibilities window is populated with the record for the selected responsibility.
  - c. With the cursor in any field of the record, select Help > Diagnostics > Examine. The Examine Field and Variable Values window opens.
  - d. In the Examine Field and Variable Values window, select APPLICATION\_ID from the Field LOV. The Value field displays the value of APPLICATION\_ID.
  - e. In the Examine Field and Variable Values window, select RESPONSIBILITY\_ID from the Field LOV. The Value field displays the value of RESPONSIBILITY\_ID.
6. Verify and/or set these additional JTF profile options for Oracle iSupport:
- **JTF\_PROFILE\_DEFAULT\_APPLICATION** - 672.  
This sets the default application. This must be set to the Oracle iSupport application ID, 672.
  - **JTF\_PROFILE\_DEFAULT\_BLANK\_ROWS** - 3  
This sets the default number of blank rows in tables on the Oracle iSupport UI. It can be set to any integer greater than zero. The recommended value is 3.

- **JTF\_PROFILE\_DEFAULT\_CSS** - jtfucss.css

This designates the default cascading style sheet to use for HTML display. The recommended value is jtfucss.css.

- **JTF\_PROFILE\_DEFAULT\_CURRENCY** - USD

This tells the application which country's monetary currency to use as a default. Set it to USD for U.S. Dollars if this is what you wish the default currency to be.

- **JTF\_PROFILE\_DEFAULT\_NUM\_ROWS** - 10

This tells the application how many rows to display when displaying tables on the UI. The recommended value is 10.

- **JTF\_NAV\_CUSTOM\_RENDERER**

This enables a custom menu with the java class name.

## A.6 Oracle iSupport Profile Options

This section describes the profile options in Oracle iSupport. Many of them are required For the service request functionality to work in Oracle iSupport, and you must set profile options in Oracle Forms. These profile values are specific to Oracle iSupport. For Oracle TeleService profile options, see the *Oracle TeleService Implementation Guide*.

Name of Profile Option	Description
Oracle iSupport: Address Field Mandatory in Service Request Creation	Possible Values: <ul style="list-style-type: none"> <li>■ Yes</li> <li>■ No (default)</li> </ul>
Oracle iSupport: Configuration of Selection of Service Request Templates	Configures the showing of template names during service request creation. This profile can be set at all levels: Site, Application, Responsibility, and User.
Oracle iSupport: Default Attachment Category for Uploading an Attachment	Distinguishes between the attachments uploaded by internal support agents and the ones that are uploaded by customer and employee users. The administrator can specify a different attachment category (user defined) for customers and employee users when attachments are uploaded during the creation and updating of service requests. This profile option can be set at four different levels: Site, Application, Responsibility, and User.

Name of Profile Option	Description
Oracle iSupport: Default Closed Status	This is the closed status of a service request when the user selects the Close button. However, when status transition is used, sysadmin needs to make sure that this status is a valid next status. Otherwise the applications error out. This value is mandatory and can be set at application and site levels.
Oracle iSupport: Default KM Solution Note Type	
Oracle iSupport: Default Note Type for Call Back Note	Stores the default note type for the callback note. The callback note is the question or statement that the customer enters while placing a callback request.
Oracle iSupport: Default Service Request Attachment Category	Possible Values: Miscellaneous (default value) Can be set at all levels – Site, Application, Responsibility, and User
Oracle iSupport: Default Solved Service Request Status	This value determines the status of the service request when it is solved after a knowledge base search in Oracle iSupport. This value is mandatory, and can be set at application and site levels.
Oracle iSupport: Default Updated Service Request Status	During service request update, automatically highlights a particular service request status in the Status dropdown list on the Service Request Details page. A user does not need to explicitly select a status when updating a service request. However, the user still has the option to select a status from the status dropdown field if needed.
Oracle iSupport: Default Updated Service Request Status	Determines the default state of a service request when it is updated.
Oracle iSupport: Display Only Return Lines in Return Detail	Displays only return lines or return lines plus order lines in return detail.
Oracle iSupport: Enable Guest User	Indicates whether a service organization wants to utilize guest user functionality. Possible Values: <ul style="list-style-type: none"> <li>■ No (default value) – guest user feature not enabled</li> <li>■ Yes – guest user feature enabled</li> </ul>

Name of Profile Option	Description
Oracle iSupport: Enable Interaction Logging	<p>Controls whether or not an interaction and interaction activities are created in the Interaction History tables when a service request is created or updated in Oracle iSupport. The service request log in Oracle iSupport shows these interactions if this profile is set to Yes.</p> <p>Possible values:</p> <ul style="list-style-type: none"><li>■ Yes</li><li>■ No (default value at the Application level)</li></ul> <p>If this profile is set to Yes, then you must set up the profile option Service: Default System Resource.</p>
Oracle iSupport: Enable Platform in Template Search	<p>Determines whether to use a platform in the criteria to search a template.</p>
Oracle iSupport: Enable Problem Code in Template Search	<p>Determines whether to use a problem code in the criteria to search a template.</p>
Oracle iSupport: Enable Product in Template Search	<p>Determines whether to use a product in the criteria to search a template.</p>
Oracle iSupport: Enable Request Type, Product, and Problem Code Mapping	<p>Determines whether, in Oracle iSupport, problem codes can be associated with service request types and/or inventory items in a many to many relationship. This profile option can be set at all levels – Site, Application, Responsibility, and User.</p> <p>Possible values:</p> <ul style="list-style-type: none"><li>■ Yes: Enable the mapping between problem code, request type, and product.</li><li>■ No: Do not enable the mapping between problem code, request type, and product.</li></ul>

Name of Profile Option	Description
Oracle iSupport: Enable Responsibility and Type Mapping	<p>Determines whether, in Oracle iSupport, the service request types can be associated with responsibilities in a many to many relationship. The Service Request Create window, depending on the setup, may display only the service request types associated with a user's current responsibility or the entire web enabled service request types.</p> <p>Possible values:</p> <ul style="list-style-type: none"> <li>■ Yes: Mapping between the service request type and responsibility will be used during service request creation.</li> <li>■ No: Mapping between the service request type and responsibility will be used during service request creation mapping table</li> </ul>
Oracle iSupport: Enable Service Request Template	<p>Determines whether service request template is able to be used. Yes: enable the template in creating a service request. No: do not use the template,show note type page.</p>
Oracle iSupport: Enable SR Type in Template Search	<p>Determines whether to use a service request type in the criteria to search a template.</p>
Oracle iSupport: Enable Urgency in Template Search	<p>Determines whether to use urgency in the criteria to search a template.</p>
Oracle iSupport: Enforce Entitlement Check Option	-
Oracle iSupport: Enforce Product Selection Option	<p>This value determines whether a product is mandatory while creating a service request. Not mandatory. Can be set at all levels.</p>
Oracle iSupport: Guest User Quick Find Display	<p>Possible Values:</p> <ul style="list-style-type: none"> <li>■ No (default value) – Quick Find is not displayed to guest users</li> <li>■ Yes – Quick Find is displayed to guest users</li> </ul> <p>Can only be set at the Site level.</p>
Oracle iSupport: Guest User Responsibility	<p>Determines what responsibility is assigned to a guest user when entering iSupport guest enabled pages.</p> <p>Valid Values: Any valid responsibility</p> <p>Default Value: IBU_GUEST_USER_RESP (iSupport Guest User)</p>

Name of Profile Option	Description
Oracle iSupport: Homepage Display Message	-
Oracle iSupport: Homepage Login Bin Menu Name	For the login bin menu, which supplies the login bin content.
Oracle iSupport: Homepage Quick Menu Name	For Quick Menu or the Support Resources bin
Oracle iSupport: Implementation Class of CIC Interface	-
Oracle iSupport: Internal Organization for Employee Service Request	-
Oracle iSupport: iSupport Home Page Show Welcome Text to Guest User	Possible values: <ul style="list-style-type: none"> <li>■ Yes</li> <li>■ No (default value)</li> </ul>
Oracle iSupport: Mandatory Layout Time Stamp	Determines the value for the time stamp recorded on creation of a mandatory layout.
Oracle iSupport: Page Level Configuration Option	Possible values: <ul style="list-style-type: none"> <li>■ Off (default value)</li> <li>■ On</li> </ul>
Oracle iSupport: Pass Default Owner to SR API When Auto Assignment is Off	-
Oracle iSupport: Published Status of an Attachment Uploaded from iSupport	Specifies different publish statuses (Internal or Published) of an attachment for customers and employee users during the creation and updating of service requests. This profile option can be set at the Site and Responsibility levels.
Oracle iSupport: Search Knowledge Base Option	Determines whether a Knowledge Base prompt shows up on the Service Request creation page or not, and whether or not the Knowledge Base search procedure is required. Not mandatory. Can be set at all levels.

Name of Profile Option	Description
Oracle iSupport: Service Request Account Option	<p>Possible values:</p> <ul style="list-style-type: none"> <li>■ Mandatory with "Select One" Option</li> <li>■ Mandatory without "Select One" Option (default value)</li> <li>■ Optional</li> </ul> <p>Can be set at the Site and Responsibility levels.</p>
Oracle iSupport: Service Request Attachment Option	<p>Determines at the site and responsibility levels whether users (employees and customers) can view the attachment section of the service request in Oracle iSupport. This profile option dictates whether or not the user can view the attachment section while creating and updating the service request.</p> <p>Possible values:</p> <ul style="list-style-type: none"> <li>■ Do not Show – do not ever show the attachment section</li> <li>■ Show during Create – show the attachment section only during SR creation</li> <li>■ Show during Update – show the attachment section only during SR updates</li> <li>■ Show during both Create and Update (default value) – show the attachment section during service request creation and updates</li> </ul> <p>Can be set at the Site and Responsibility levels.</p>
Oracle iSupport: Service Request Bill To Address Option	<p>Possible values:</p> <ul style="list-style-type: none"> <li>■ Mandatory</li> <li>■ Not Displayed (default value)</li> <li>■ Optional</li> </ul>
Oracle iSupport: Service Request Bill To Contact Option	<p>Possible values:</p> <ul style="list-style-type: none"> <li>■ Mandatory</li> <li>■ Not Displayed (default value)</li> <li>■ Optional</li> </ul>
Oracle iSupport: Service Request Closed Note Type	<p>Determines the default Note Type when a Service Request is closed.</p>
Oracle iSupport: Service Request Configuration Option	-

Name of Profile Option	Description
Oracle iSupport: Service Request Creation Note Type	Determines the default Note Type when a Service Request is created. Not mandatory. Can be set at all levels.
Oracle iSupport: Service Request Escalate Note Type	Determines the default Note Type when a Service Request is escalated.
Oracle iSupport: Service Request Installed At Address Option	Possible values: <ul style="list-style-type: none"> <li>▪ Mandatory</li> <li>▪ Not Displayed (default value)</li> <li>▪ Optional</li> </ul>
Oracle iSupport: Service Request Installed at Contact Option	-
Oracle iSupport: Service Request Location Address Validation Class	Provides an open interface to allow a support organization to do address validation based on its needs, like jurisdiction checking.
Oracle iSupport: Service Request Product Category Set	-
Oracle iSupport: Service Request Product Option	-
Oracle iSupport: Service Request Reopen Time Limit in Hours	Set to the time limit in hours within which one can reopen a service request.
Oracle iSupport: Service Request Ship To Address Option	Possible values: <ul style="list-style-type: none"> <li>▪ Mandatory</li> <li>▪ Not Displayed (default value)</li> <li>▪ Optional</li> </ul>
Oracle iSupport: Service Request Ship To Contact Option	Possible values: <ul style="list-style-type: none"> <li>▪ Mandatory</li> <li>▪ Not Displayed (default value)</li> <li>▪ Optional</li> </ul>

Name of Profile Option	Description
Oracle iSupport: Service Request Template Option	<p>Possible values</p> <ul style="list-style-type: none"> <li>▪ Do not Include Default and Highlight “Select One” Option</li> <li>▪ Do not Include Default and Highlight First One</li> <li>▪ Include Default and Highlight “Select One” Option (default value)</li> <li>▪ Include Default and Highlight Default</li> <li>▪ Include Default and Highlight First One</li> </ul> <p>Can be set at all levels – Site, Application, Responsibility, and User.</p>
Oracle iSupport: Service Request Update Note Type	<p>Determines the default Note Type used when a Service Request is updated. Not mandatory. Can be set at all levels.</p>
Oracle iSupport: Show Address Section in Service Request	<p>Possible values:</p> <ul style="list-style-type: none"> <li>▪ Yes</li> <li>▪ No (default)</li> </ul>
Oracle iSupport: Show Task in Service Request Module	<p>Indicates whether the related published tasks for a service request are shown to a user or not. The possible values are:</p> <ul style="list-style-type: none"> <li>▪ Yes: The Service Request Details Page displays a task section showing published tasks. Tasks are also shown in the log section of the service request</li> <li>▪ No: The Task section is hidden from the Service Request Details Page, and no task is shown in log section.</li> </ul> <p>This profile option can be set at all the levels – Site, Application, Responsibility and User.</p>
Service: Restrict Installed Base for location validation	<p>Possible values:</p> <ul style="list-style-type: none"> <li>▪ Yes</li> <li>▪ No</li> </ul> <p>No default value.</p>

## A.7 Oracle Service Profile Options

The following service core profile options can be set according to your business requirements. See the *Oracle TeleService Implementation Guide* for further information about these and other Oracle Service profile options.

- **Service: Default Service Request Severity:** Determines the default severity of a created service request.
- **Service: Default Service Request Status:** Determines the default status of a created service request.
- **Service: Default Service Request Type:** Determines the default type of a created service request.
- **Service: Default Service Request Urgency:** Determines the default urgency of a created service request.
- **Service: Default Service Request Owner:** Determines the default Resource ID when a Service Request is created. This should be set at the application level.
- **Service: Default Service Request Owner Type:** Determines the default owner type of a created service request.
- **Service: Default Product Category Set:** Determines the default product category set for a service request.
- **Service: Default Platform Category Set:** Determines the default platform category set for a service request.
- **Service: Inventory Validate Organization:** Maps Inventory/Product Organization.source:
- **Service Item Flexfield (Product):** This value determines the Oracle Inventory key flexfield structure you want to use when displaying the product. This value is mandatory; without it, the system will be unable to display the product number. It is recommended that you set this profile to MSTK. Set at application and site levels.
- **Service: Item Flexfield (Service):** This value determines the Oracle Inventory key flexfield structure you want to use when displaying support services. This value is mandatory. It is recommended that you set this profile to MSTK. Set at application and site levels.
- **Service: System generated Service Request Number**
- **Service: Active Knowledge Base System** - Selection for which integrated HTML based Knowledge Base System is being used. Allowed values: Oracle Basic Knowledge Base Search, Oracle Advanced Knowledge Base Search.
- **Service: Auto Launch Workflow** - Determines whether Workflow launches automatically when a service request is created.

- **Service: Allow Updates Across Organizations** - Allows users to make updates and deletions to data not belonging to their own operating units. Set to Yes.
- **Service: Use SR Type – Responsibility Mapping** - No default values.
- **Service: Restrict Installed Base for Location Validation** - Possible values are Yes and No, with no default value.
- **Service: Default Make Public Flag**
- **Service: Publish Flag Update Allowed**
- **Service: Time Unit of Measure Class**
- **Service: Minute Unit of Measure**
- **Service: Hour Unit of Measure**
- **Service: Day Unit of Measure** - Identifies the unit of measure representing the day. This option is required.
- **Service: Month Unit of Measure**
- **Service: Item for facilitating conversions of units of time** Service: INC\_DEFAULT\_INCIDENT\_OWNER - Determines the default Resource ID when a service request is created. Set this at the application level.

## A.8 Returns Profile Options

The following profile options allow returns functionality in Oracle iSupport:

- **ASO: Default Order Type** - This profile determines how the order is to be processed in Oracle Order Management. The order types are set up in Oracle Order Management. This profile also determines what price list and currency code appear by default in the main Quoting window. If this profile value is null, no default value is assumed. Set to Mixed.
- **ASO: Default Order State** - Set to Booked.
- **ASO: Enable ASO Debug** - Set to Yes to allow returns debugging.
- **ASO: Product Organization** - Defines which product organization to look for products. *Note the space between the name ASO and the colon (:) in the name of the profile.* Set this to your master organization.
- **ASO: Validate Salesrep** - This profile is used to determine whether a Sales representative must be specified on a quote prior to creating an order. If this

profile is set to Yes, a sales representative must be specified on the quote prior to creating an order. If this profile is set to No, then a sales representative will be defaulted from ASO: Default Salesrep. If this profile value is null, a default value of Yes is assumed. For Oracle iSupport, set this value to No.

- **OM: Debug Level** - This profile option determines the level of debug messages printed in a OE Debug log file. To print all messages set it to 5 and for no messages set it to NULL. The default value is NULL.
- **OM: DEBUG LOG Directory** - The directory path of the OM debug log file. Specify the value from the session parameter `utl_file_dir` from `v$parameters`. The default value is NULL.

## A.9 Oracle Knowledge Management Profile Options

Oracle Knowledge Management has its own set of profile options. If you are implementing Knowledge Management, set the following profile options:

- **CS\_KB\_ALLOW\_KB\_NOTE\_UPDATE** - Allows the update of notes that have been saved to the Knowledge Base. Seeded value: No. Allowed values: No, Yes
- **CS\_KB\_DEFAULT\_SOLUTION\_TYPE** - Allows you to define a specific Solution Type as a default. Allowed values: any. Seeded default values:
  - KB\_SYMPTOM
  - KB\_FACT
  - KB\_CHANGES
  - KB\_CAUSE
  - KB\_OBJECTIVE
  - KB\_ACTION
- **CS\_KB\_DEF\_CONTRIBUTION\_STATUS** - Default Status for Knowledge Base Contributions: You can use the status with user privileges to determine which users can see what information. Seeded default value: Draft. Allowed values:
  - DRAFT
  - PUBLIC
  - PUBLIC\_INTERNAL
  - TECHNICAL\_REVIEW
  - UNDER\_EDIT

- **PUBLIC\_LIMITED**
- **CS\_KB\_MAX\_SEARCH\_RESULTS** - Maximum Number of Search Results to be Queried from the Database: You can set up this value to any reasonable number. The top scored results in the database will be displayed from the highest score to the lowest score. Seeded default value: 100
- **CS\_KB\_PRODUCT\_CATEGORY\_SET** - Service: Default Knowledge Base Category Set. This selects the Product Category Set to populate the Product LOV in the Knowledge Management windows.

## A.10 Miscellaneous Profile Options

A number of profile options categorized here as miscellaneous should be set at the site-level.

- **MO: Operating Unit** - Set this to your master organization.
- **OE: Item Validation Organization** - Set this to your master organization.
- **APPS\_SERVLET\_AGENT** - This is the URL that will be used to call JSP forms from applications menus. Set to the URL for the Apache server.



# B

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## Seed Data

This appendix lists that data that ships with Oracle iSupport as seed data, or data that is shipped "out-of-the-box." Covered here are:

- [Seeded Menus](#)
- [Seeded Functions](#)
- [Seeded User Responsibilities](#)
- [Seeded User Roles](#)
- [Seeded Permissions](#)

### B.1 Seeded Menus

This section lists menus associated with the application.

#### B.1.1 Oracle iSupport Menus

The table below, Oracle iSupport Menus, shows the main menus and a description of each menu.

**Table B-1 Oracle iSupport Menus**

Menu	Description
IBU_A_FB_MENU	Administration > Survey
IBU_A_FORUM_MENU	Administration > Forum
IBU_A_FR_CATEGORY_MENU	Administration > Forum > Category
IBU_A_FR_FORUM_MENU	Administration > Forum > Forum
IBU_A_FR_USERGROUP_MENU	Administration > Forum > Usergroup

**Table B-1 Oracle iSupport Menus**

<b>Menu</b>	<b>Description</b>
IBU_A_PROFILE_MENU	Administration > Homepage
IBU_A_RM_MENU	Administration > Support > Request Management
IBU_A_ROOT_MENU	Administration tabs: User, Homepage, etc.
IBU_A_SUB	Administration > Homepage > Subscription
IBU_A_SUPPORT_MENU	Administration > Support
IBU_A_USER_MENU	Administration > User
IBU_ACCOUNT_MENU	Account submenu
IBU_BUS_USER_HELP_MENU -	Menu for home page bin for business users
IBU_BUS_USER_PROFILE_MENU	Profile menu for B2B user
IBU_BUS_USER_TOP_MENU	Top menu for iSupport B2B user
IBU_DEFAULT_CONFIG_MENU	Menu for default configuration UI
IBU_EMP_USER_HELP_MENU	Menu for home page bin for employee users
IBU_EMP_USER_PROFILE_MENU	Menu for employee profile
IBU_EMPL_ISUPPORT_MENU	iSupport menu for iSupport employee user
IBU_EMPL_REQ_MENU	Support menu for employee users
IBU_EMPL_USER_TOP_MENU	Top menu for iSupport employee user
IBU_GUEST_LOGINBIN_MENU	Menu for guest user login bin
IBU_GUEST_SUPPORT_MENU	Guest users Support submenu
IBU_GUEST_USER_HELP_MENU	Menu for home page bin for guest users
IBU_GUEST_USER_TOP_MENU	Top level menu for guest users
IBU_HOME_MENU	iSupport > Home
IBU_IB_MENU	Home > Products
IBU_IND_USER_HELP_MENU	Menu for home page bin for individual users
IBU_IND_USER_PROFILE_MENU	User profile menu for iSupport B2C user
IBU_IND_USER_TOP_MENU	Top menu for iSupport B2C user
IBU_INQ_MENU	iSupport > Account (for sys_admin responsibility)
IBU_ISUPPORT_MENU	iSupport (primary user iSupport menu)
IBU_PRI_USER_HELP_MENU	Menu for home page bin for primary users
IBU_PRI_USER_REQ_MENU	iSupport > Support menu (for iSupport primary user)
IBU_PRI_USER_TOP_MENU	Top menu for iSupport primary user
IBU_PROFILE_ACCOUNT_MENU	Menu for account settings

**Table B-1 Oracle iSupport Menus**

Menu	Description
IBU_PROFILE_COMPANY_MENU	Company profile menu
IBU_PROFILE_EMP_MENU	Side menu for employee profile
IBU_PROFILE_MENU	Menu for iSupport settings
IBU_PROFILE_USER_MENU	User profile menu
IBU_REQ_MENU	Home > Support
IBU_ROOT_MENU	iSupport (sys_admin) responsibility
IBU_ROOT_MENU_GUEST	Guest users iSupport submenu
IBU_ROOT_PROFILE_MENU	Root menu for profile
IBU_SUPPORT_MENU	Support submenu

## B.1.2 Oracle iSupport Top Menus by User Type

The table below, Oracle iSupport Top Menus by User Type, shows the top menus by user type.

**Table B-2 Oracle iSupport Top Menus by User Type**

Menu	Description
IBU_BUS_USER_TOP_MENU	Top menu for iSupport Business (B2B) User
IBU_EMPL_USER_TOP_MENU	Top menu for iSupport Employee (B2E) User
IBU_GUEST_USER_TOP_MENU	Top menu for iSupport Guest User
IBU_IND_USER_TOP_MENU	Top menu for iSupport Individual (B2C) User
IBU_PRI_USER_TOP_MENU	Top menu for iSupport Primary User
IBU_SYS_ADMIN_TOP_MENU	Top menu for iSupport Administrator

## B.1.3 Oracle iSupport Menu Structures by User Type

The tables below shows the Oracle iSupport menu structures by user types.

**Table B-3 Menu Structure for an Oracle iSupport Business User**

Global	Level 1	Level 2
iSupport	Home	-
-	Accounts	Orders

**Table B-3 Menu Structure for an Oracle iSupport Business User**

<b>Global</b>	<b>Level 1</b>	<b>Level 2</b>
-	-	Invoices
-	-	Payments
-	-	Contracts
-	-	Returns
-	-	Products
-	Support	Ask Me
-	-	Technical Library
-	-	Forum
-	-	View/Update Request
-	-	Create Request
Profile	User Profile	Personal Profile
-	-	Contact Points
-	-	Addresses
-	-	Navigation Preferences
-	-	Display Preferences
-	-	Accounts
-	-	Support
-	-	My Enrollments
-	Company Profile	Information
-	-	Contact Points
-	-	Addresses
-	-	Administrators
Contact Us	-	-
Feedback	-	-

**Table B-4 Menu Structure for an Oracle iSupport Employee User**

<b>Global</b>	<b>Level 1</b>	<b>Level 2</b>
iSupport	Home	-
-	Support	(same as a business user)
Profile	User Profile	Personal Profile
-	-	Contact Points
-	-	Addresses
-	-	Navigation Preferences
-	-	Display Preferences
-	-	Support
Feedback	-	-

**Table B-5 Menu Structure for an Oracle iSupport Guest User**

<b>Global</b>	<b>Level 1</b>	<b>Level 2</b>
iSupport	Home	-
-	Support	Solutions
-	-	Technical Library
Login	-	-
Register	-	-

**Table B-6 Menu Structure for an Oracle iSupport Individual User**

<b>Global</b>	<b>Level 1</b>	<b>Level 2</b>
iSupport	Home	(same as a business user)
-	Accounts	(same as a business user)
-	Support	(same as a business user)
Profile	User Profile	(same as a business user)

**Table B-7 Menu Structure for an Oracle iSupport Primary User**

<b>Global</b>	<b>Level 1</b>	<b>Level 2</b>
iSupport	Home	(same as a business user)
-	Accounts	(same as a business user)
-	Support	(same as a business user)
Profile	(same as a business user)	-
Contact Us	-	-
Feedback	-	-
Administration	User	-
-	Pending Approvals	-

**Table B-8 Menu Structure for an Oracle iSupport Administrator**

<b>Global</b>	<b>Level 1</b>	<b>Level 2</b>
iSupport	(same as employee user)	-
Profile	(same as a business user)	-
Feedback	-	-
Administration	User	User
-	-	Pending Approvals
-	Homepage	Content
-	-	Subscription
-	Support	Request Template
-	-	Call Me
-	-	Survey
-	-	Technical Library
-	-	User Group
-	Forum	Category
-	-	Forum

**Table B–8 Menu Structure for an Oracle iSupport Administrator**

Global	Level 1	Level 2
-	-	Message
-	-	User Group
-	Solutions	Knowledge
-	-	Authoring
-	-	Setup
-	MES	Categories
-	-	My Channels
-	-	Publish
-	-	Administration

## B.2 Oracle iSupport Functions

The table below, Oracle iSupport Functions, shows the functions that are linked to menus, along with a description of each function.

**Table B–9 Oracle iSupport Functions**

Function	Description
IBU_ACCOUNT_CONTACT	not used
IBU_A_CAT_FN	Administration > Support > Technical Library
IBU_A_CM_FN	Administration > Support > Call Me
IBU_A_FB_LIST_FN	Administration > Survey > Feedback List
IBU_A_FR_CT_CREATE_FN	Administration > Category > Create
IBU_A_FR_CT_DELETE_FN	Administration > Category > Delete
IBU_A_FR_CT_MODSTATUS_FN	Administration > Category > Modify
IBU_A_FR_CT_RENAME_FN	Administration > Category > Rename
IBU_A_FR_FR_CREATE_FN	Administration > Forum > Create
IBU_A_FR_FR_DELETE_FN	Administration > Forum > Delete
IBU_A_FR_FR_MODATTR_FN	Administration > Forum > Modify Attribute
IBU_A_FR_FR_MODSTATUS_FN	Administration > Forum > Modify Status
IBU_A_FR_FR_MOVE_FN	Administration > Forum > Move
IBU_A_FR_FR_RENAME_FN	Administration > Forum > Rename

**Table B-9 Oracle iSupport Functions**

<b>Function</b>	<b>Description</b>
IBU_A_FR_MESSAGE_FN	Administration > Forum > Messages
IBU_A_FR_UG_ASSC_FN	Administration > Forum > Associate Usergroup
IBU_A_FR_UG_DISASSC_FN	Administration > Forum > Disassociate Usergroup
IBU_A_PZ_FN	Administration > Homepage > Personalize
IBU_A_RM_FN	Administration > Support > Request Management
IBU_A_RM_TEMPLATE_FN	Administration > Support > Request Management > Template
IBU_A_RPT_FN	Not used in generic product.
IBU_A_SUB_FN	Administration > Homepage > Subscription subtab
IBU_A_TM_FN	Administration > Subscription > Template
IBU_A_UG_FN	Administration > Support > Usergroup
IBU_A_USER_APPROVALS_FN	Administration > User > Pending Approvals
IBU_A_USER_FN	Administration > Users
IBU_CMN_FORUM	Forum tab
IBU_COMPANY_ADDRESS	Profile > Company address
IBU_COMPANY_ADMIN	Profile > Company Administrators
IBU_COMPANY_CONTACT_POINTS	Profile > Contact points of company
IBU_COMPANY_INFORMATION	Profile > Company Information
IBU_GEN_PREF	Profile > General Preferences
IBU_HLP_CALLME	Support > Contact Us
IBU_HLP_FEEDBACK	Support > Survey
IBU_HOM_HOME	iSupport Home
IBU_INQ_ACCOUNT	Accounts
IBU_INQ_CONTRACTS	Accounts > Contracts
IBU_INQ_DEFECTS	Defects
IBU_INQ_INSTALLBASE	Install Base
IBU_INQ_INSTALLBASEREPORT	Install Base Report
IBU_INQ_INSTALLBASE_ADDPRODUCT	Install Base Add Product
IBU_INQ_INSTALLBASE_BUILT	Install Base as Built
IBU_INQ_INSTALLBASE_SUMMARY	Install Base Summary
IBU_INQ_INVOICES	Accounts > Invoices
IBU_INQ_ORDERS	Accounts > Orders

**Table B-9 Oracle iSupport Functions**

<b>Function</b>	<b>Description</b>
IBU_INQ_PAYMENTS	Accounts > Payments
IBU_INQ_RMAS	Accounts > Returns
IBU_LOGIN_FN	JTF Login page. If you want to use your own login page or to use the guest user home page as the login page, then you can customize IBU_LOGIN_FN to point to the appropriate JSP.
IBU_PERSONAL_PROFILE	Profile button
IBU_PROFILE_CONTRACT	not used
IBU_PROFILE_GENERAL	Profile > User Profile > Support
IBU_REGISTER_FN	JTF Register page
IBU_REQ_ASKME	Search Knowledge Base
IBU_REQ_CREATECSR	Support > Create Service Requests
IBU_REQ_VIEWSR	Support > View Service Requests
IBU_SYSTEM_ADD	not used
IBU_SYSTEM_ADM	not used
IBU_SYSTEM_CSI	not used
IBU_SYSTEM_LIC	not used
IBU_SYSTEM_PRF	not used
IBU_SYSTEM_ROL	not used
IBU_SYSTEM_USR	not used
IBU_USER_ACCOUNTS	Profile > User Profile > Accounts
IBU_USER_ADDRESSES	Profile > User Profile > Addresses
IBU_USER_CONTACTPOINTS	Profile > User Profile > Contact Points
IBU_USER_CONTRACTS	not used

## B.3 Seeded User Responsibilities

The table below, Oracle iSupport User Responsibilities, displays seeded user responsibilities and their descriptions.

**Table B–10 Oracle iSupport User Responsibilities**

<b>Responsibility</b>	<b>Description</b>
IBU_GUEST_USER_RESP	iSupport Guest User
IBU_BUSINESS_USER_RESP	iSupport Business (B2B) Users
IBU_INDIVIDUAL_USER_RESP	iSupport Individual (B2C) User
IBU_EMPLOYEE_USER_RESP	iSupport Employee (B2E) Users
IBU_PRIMARY_USER_RESP	iSupport Primary User
IBU_SYS_ADMIN	For iSupport Administrator user

## B.4 Seeded User Roles

This section contains information about seeded roles and permissions.

### B.4.1 User Roles

The table below, Oracle iSupport User Roles, displays seeded user roles and their descriptions.

**Table B–11 Oracle iSupport User Roles**

<b>Role</b>	<b>Description</b>
IBU_B2B_PRIMARY_USER_MANAGEMENT	Contains permissions for standard iSupport Primary User.
IBU_EMPLOYEE	Contains permissions for standard Employee User.
IBU_GUEST_USER	Contains permissions for standard guest users.
IBU_REG_USER	Contains permissions for standard registered B2B and B2C users.
IBU_SYSTEM_ADMIN	Contains permissions for standard iSupport Administrator.

### B.4.2 Oracle iSupport User Roles by User Type

The table below, Oracle iSupport User Roles by User Type, displays Oracle iSupport typical users and the roles they must receive to receive their appropriate permissions.

**Table B-12 Oracle iSupport User Roles by User Type**

User	Roles Assigned
B2C, B2B users	IBU_REG_USER
Primary User	IBU_REG_USER, IBU_B2B_PRIMARY_USER_MANAGEMENT
Employee User	IBU_REG_USER, IBU_EMPLOYEE
Guest User	IBU_GUEST_USER
iSupport Administrator	IBU_REG_USER, IBU_SYSTEM_ADMIN

## B.5 Seeded Permissions

This section displays the user roles and the permissions that they contain.

The table below, Oracle iSupport Permissions, displays the permissions associated with the seeded user roles.

**Table B-13 Oracle iSupport Permissions**

Role	Permissions
IBU_B2B_PRIMARY_USER_MANAGEMENT	IBU_USER_MGMT
-	IBU_USER_MGMT_VIEW_COMPANY_USER
-	IBU_USER_MGMT_VIEW_MY_ROLE
-	JTF_PRIMARY_USER_SUMMARY
-	IBU_ADMIN_UPDATE
-	IBU_ADMIN_VIEW
IBU_EMPLOYEE	IBU_SR_Upload_Attachment
IBU_GUEST_USER	IBU_GUEST_USER. Used in code logic to determine if the current user is a guest user.
-	IBU_HOMEPAGE_HIDE_CUSTOMIZE. Used to determine if the Customize link should be hidden from the user for the home page.
IBU_REG_USER	CSI_ACCT_ACCESS_ONLY
-	CSI_ADDI_ATTR_UPDATE

**Table B-13 Oracle iSupport Permissions**

<b>Role</b>	<b>Permissions</b>
-	CSI_ADDI_ATTR_VIEW
-	CSI_CONTACT_DETAIL_UPDATE
-	CSI_CONTACT_DETAIL_VIEW
-	CSI_CONTRACT_UPDATE
-	CSI_CONTRACT_VIEW
-	CSI_CREATE_INST_UPDATE
-	CSI_CREATE_INST_VIEW
-	CSI_GENERAL_ATTRIB_CUST_ONLY
-	CSI_INST_CONFIG_UPDATE
-	CSI_INST_CONFIG_VIEW
-	CSI_INST_GENERAL_UPDATE
-	CSI_INST_GENERAL_VIEW
-	CSI_LATEST_TRANSACTION_UPDATE
-	CSI_LATEST_TRANSACTION_VIEW
-	CSI_PARTY_CONTACT_UPDATE
-	CSI_PARTY_CONTACT_VIEW
-	CSI_PERZ_EDIT_UPDATE
-	CSI_PERZ_EDIT_VIEW
IBU_REG_USER (cont.)	CSI_PRICING_UPDATE
-	CSI_PRICING_VIEW
-	CSI_PROPERTY_READ
-	CSI_REPAIR_ORDER_UPDATE
-	CSI_REPAIR_ORDER_VIEW
-	CSI_SEARCH_PRODUCT_UPDATE
-	CSI_SEARCH_PRODUCT_VIEW
-	CSI_SERVICE_REQUEST_UPDATE
-	CSI_SERVICE_REQUEST_VIEW

**Table B-13 Oracle iSupport Permissions**

<b>Role</b>	<b>Permissions</b>
-	CSI_SHOW_EXT_CONTACTS
-	CSI_SHOW_EXT_LOCATIONS
-	CSI_SHOW_EXT_PARTIES
-	CSI_SHOW_INST_CUSTOMER_MENU
-	CSI_SPLIT_QUANTITY_UPDATE
-	CSI_SPLIT_QUANTITY_VIEW
-	CSI_TRANSACTION_DETAIL_UPDATE
-	CSI_TRANSACTION_DETAIL_VIEW
-	CSI_TRANSACTION_INSTANCE_UPDATE
-	CSI_TRANSACTION_INSTANCE_VIEW
-	CS_Freq_Used_Sol_View
-	CS_Products_Add
-	CS_Products_Delete
-	CS_Products_Update
-	CS_Products_View
-	CS_Rec_Sol_View
-	CS_Solution_View
-	CS_Solution_View_All
IBU_REG_USER (cont.)	IBU_CallMe
-	IBU_Contracts_View
-	IBU_Defects_View
-	IBU_Forum
-	IBU_Forum_View_Restrict
-	IBU_Homepage
-	IBU_Homepage_Update
-	IBU_Invoices_View
-	IBU_Orders_View

**Table B-13 Oracle iSupport Permissions**

<b>Role</b>	<b>Permissions</b>
-	IBU_Patch_View
-	IBU_Payments_View
-	IBU_Profile_Update
-	IBU_Request_Close
-	IBU_Request_Create
-	IBU_Request_Escalate
-	IBU_Request_Update
-	IBU_Request_View
-	IBU_Request_View_Account
-	IBU_Request_View_Company
-	IBU>Returns_Add
-	IBU>Returns_View
-	IBU_Role_Mgt
-	IBU_SR_Upload_Attachment
-	IBU_Survey_Create
-	IBU_Technical_Library_View
-	IBU_User_Mgt
IBU_SYSTEM_ADMIN	CS_Assoc_Ext_Obj_To_Sol
-	CS_Assoc_Ext_Obj_To_Stmt
-	CS_Categories_View
IBU_SYSTEM_ADMIN (cont.)	CS_EMPLOYEE_CONTACT_ADD
-	CS_Freq_Used_Def_Update
-	CS_Freq_Used_Def_View
-	CS_Freq_Used_Sol_View
-	CS_PROPERTY_UPDATE
-	CS_Products_Add
-	CS_Products_Delete

**Table B-13 Oracle iSupport Permissions**

<b>Role</b>	<b>Permissions</b>
-	CS_Products_Report
-	CS_Products_Update
-	CS_Products_View
-	CS_Rec_Sol_Update
-	CS_Rec_Sol_View
-	CS_Solution_Create
-	CS_Solution_Delete
-	CS_Solution_Status_Update
-	CS_Solution_Update
-	CS_Solution_View
-	CS_Solution_View_All
-	CS_Solution_View_B
-	CS_Solution_View_Internal
-	CS_Solution_View_Public
-	CS_Solution_View_Restricted
-	CS_Statement_Create
-	CS_Statement_Delete
-	CS_Statement_Global_Update
-	CS_Statement_Update
-	CS_Statement_View
IBU_SYSTEM_ADMIN (cont.)	CS_Types_Edit
-	CS_Types_View
-	CS_Workflow_Setup_View
-	IBU_Forum_Category_Edit
-	IBU_Forum_Edit
-	IBU_Forum_Messages_Edit
-	IBU_Forum_User_Group_Edit

**Table B-13 Oracle iSupport Permissions**

<b>Role</b>	<b>Permissions</b>
-	IBU_Personalized_Homepage_Edit
-	IBU_Request_Management_Edit
-	IBU_Subscription_Edit
-	IBU_Survey_Import
-	IBU_TEMPLATE_MANAGEMENT
-	IBU_USER_MGMT
-	IBU_USER_MGMT_VIEW_ALL_ROLE
-	IBU_USER_MGMT_VIEW_ALL_USER
-	IBU_USER_MGMT_VIEW_COMPANY_USER
-	IBU_USER_MGMT_VIEW_MY_ROLE
-	IBU_User_Group_Edit
-	JTF_DAC_Maintain
-	JTF_REG_APPROVAL
-	JTF_SECURITY_ASSIGN_ROLE
-	IBU_ADMIN_UPDATE
-	IBU_ADMIN_VIEW

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# Functions and Variables for Page-Level Configurability

## C.1 Functions for Page-Level Configurability

The table in this section lists the functions that are used to place your customized Java service pages (JSPs) on content pages that Oracle supplies. With these functions, you can configure the high-level look and feel of your Oracle iSupport web pages. The end of function names relates to the placement of a customized JSP on an Oracle content page as follows:

- TOP means that a customized JSP will go at the top of the content page.
- LEFT means that a customized JSP will go at the left of the content page.
- RIGHT means that a customized JSP will go at the right of the content page.
- BOTTOM means that a customized JSP will go at the bottom of the content page.

**Table C-1** *Functions for Configurability of Look and Fee of Pages*

Page Name	Function Name
Home Page	IBU_HOME_SECTION_TOP
	IBU_HOME_SECTION_LEFT
	IBU_HOME_SECTION_RIGHT
	IBU_HOME_SECTION_BOTTOM
Create Service Request First Page	IBU_SR_CNFG_CREATE_MAIN_TOP
	IBU_SR_CNFG_CREATE_MAIN_LEFT
	IBU_SR_CNFG_CREATE_MAIN_RIGHT
	IBU_SR_CNFG_CREATE_MAIN_BOTTOM

**Table C-1 Functions for Configurability of Look and Fee of Pages**

<b>Page Name</b>	<b>Function Name</b>
Create Service Request Template Page	IBU_SR_CNFG_CREATE_TMPL_TOP
	IBU_SR_CNFG_CREATE_TMPL_LEFT
	IBU_SR_CNFG_CREATE_TMPL_RIGHT
	IBU_SR_CNFG_CREATE_TMPL_BOTTOM
Create Service Request Verification	IBU_SR_CNFG_CREATE_VRFY_TOP
	IBU_SR_CNFG_CREATE_VRFY_LEFT
	IBU_SR_CNFG_CREATE_VRFY_RIGHT
	IBU_SR_CNFG_CREATE_VRFY_BOTTOM
Create Service Request Confirmation	IBU_SR_CNFG_CREATE_CNFM_TOP
	IBU_SR_CNFG_CREATE_CNFM_LEFT
	IBU_SR_CNFG_CREATE_CNFM_RIGHT
	IBU_SR_CNFG_CREATE_CNFM_BOTTOM
Service Request Details	IBU_SR_CNFG_DETAILS_TOP
	IBU_SR_CNFG_DETAILS_LEFT
	IBU_SR_CNFG_DETAILS_RIGHT
	IBU_SR_CNFG_DETAILS_BOTTOM
Service Request Summary	IBU_SR_CNFG_SUMMARY_TOP
	IBU_SR_CNFG_SUMMARY_LEFT
	IBU_SR_CNFG_SUMMARY_RIGHT
	IBU_SR_CNFG_SUMMARY_BOTTOM
Service Request Search	IBU_SR_CNFG_SEARCH_TOP
	IBU_SR_CNFG_SEARCH_LEFT
	IBU_SR_CNFG_SEARCH_RIGHT
	IBU_SR_CNFG_SEARCH_BOTTOM
Order Summary	IBU_ORDERSU_SECTION_TOP
	IBU_ORDERSU_SECTION_LEFT
	IBU_ORDERSU_SECTION_RIGHT
	IBU_ORDERSU_SECTION_BOTTOM
Order Detail	IBU_ORDERDT_SECTION_TOP
	IBU_ORDERDT_SECTION_LEFT
	IBU_ORDERDT_SECTION_RIGHT
	IBU_ORDERDT_SECTION_BOTTOM
Order Shipment	IBU_ORDERSH_SECTION_LEFT
	IBU_ORDERSH_SECTION_RIGHT
	IBU_ORDERSH_SECTION_TOP
	IBU_ORDERSH_SECTION_BOTTOM

**Table C-1 Functions for Configurability of Look and Fee of Pages**

<b>Page Name</b>	<b>Function Name</b>
Invoice Summary	IBU_INVSU_SECTION_TOP IBU_INVSU_SECTION_LEFT IBU_INVSU_SECTION_RIGHT IBU_INVSU_SECTION_BOTTOM
Invoice Detail	IBU_INVDT_SECTION_TOP IBU_INVDT_SECTION_LEFT IBU_INVDT_SECTION_RIGHT IBU_INVDT_SECTION_BOTTOM
Invoice Payment	IBU_INVPT_SECTION_LEFT IBU_INVPT_SECTION_RIGHT IBU_INVPT_SECTION_TOP IBU_INVPT_SECTION_BOTTOM
Payment Summary	IBU_PAYSU_SECTION_TOP IBU_PAYSU_SECTION_LEFT IBU_PAYSU_SECTION_RIGHT IBU_PAYSU_SECTION_BOTTOM
Payment Detail	IBU_PAYDT_SECTION_LEFT IBU_PAYDT_SECTION_RIGHT IBU_PAYDT_SECTION_TOP IBU_PAYDT_SECTION_BOTTOM
Return Creation	IBU_RETCRT_SECTION_TOP IBU_RETCRT_SECTION_LEFT IBU_RETCRT_SECTION_RIGHT IBU_RETCRT_SECTION_BOTTOM
Return Confirmation	IBU_RETCONF_SECTION_TOP IBU_RETCONF_SECTION_LEFT IBU_RETCONF_SECTION_RIGHT IBU_RETCONF_SECTION_BOTTOM
Return Summary	IBU_RETSUM_SECTION_TOP IBU_RETSUM_SECTION_LEFT IBU_RETSUM_SECTION_RIGHT IBU_RETSUM_SECTION_BOTTOM
Return Detail	IBU_RETDET_SECTION_TOP IBU_RETDET_SECTION_LEFT IBU_RETDET_SECTION_RIGHT IBU_RETDET_SECTION_BOTTOM

**Table C-1 Functions for Configurability of Look and Fee of Pages**

<b>Page Name</b>	<b>Function Name</b>
Return Search	IBU_RETSRCH_SECTION_TOP IBU_RETSRCH_SECTION_LEFT IBU_RETSRCH_SECTION_RIGHT IBU_RETSRCH_SECTION_BOTTOM
Technical Library	IBU_TECHLIB_SECTION_TOP IBU_TECHLIB_SECTION_LEFT IBU_TECHLIB_SECTION_RIGHT IBU_TECHLIB_SECTION_BOTTOM
Contact Us (Call Me)	IBU_CALLBACK_SECTION_TOP IBU_CALLBACK_SECTION_LEFT IBU_CALLBACK_SECTION_RIGHT IBU_CALLBACK_SECTION_BOTTOM
Knowledge Management Browse	CS_KB_BROWSE_TOP_FN CS_KB_BROWSE_LEFT_FN CS_KB_BROWSE_RIGHT_FN CS_KB_BROWSE_BOTTOM_FN  Refer to <i>Oracle Knowledge Management Implementation Guide</i> for details on using these functions.
Knowledge Management Search Result	CS_KB_SEARCH_RESULT_TOP_FN CS_KB_SEARCH_RESULT_LEFT_FN CS_KB_SEARCH_RESULT_RIGHT_FN CS_KB_SEARCH_RESULT_BOTTOM_FN  Refer to <i>Oracle Knowledge Management Implementation Guide</i> for details on using these functions.
Knowledge Management Solution Detail	CS_KB_SOLN_DETAIL_TOP_FN CS_KB_SOLN_DETAIL_LEFT_FN CS_KB_SOLN_DETAIL_RIGHT_FN CS_KB_SOLN_DETAIL_BOTTOM_FN  Refer to <i>Oracle Knowledge Management Implementation Guide</i> for details on using these functions.

## C.2 Variables for Page-Level Configurability

The table in this section lists the variables that are available to use in your customized Java service pages (JSPs). The variables provide access to elements of the content that Oracle supplies.

**Table C-2 Context Variables Available for Custom JSPs**

<b>Context Variables for a Logged-In User</b>	<b>Means to Retrieve the Context Variable</b>
UserID	((Long)pageContext.getAttribute ("ibuConfigUserID", PageContext.REQUEST_SCOPE))
RespID id	((Long)pageContext.getAttribute ("ibuConfigRespID",PageContext.REQUEST_SCOPE))
AppID id	((Long)pageContext.getAttribute ("ibuConfigAppID", PageContext.REQUEST_SCOPE))
RespAppID	((Long)pageContext.getAttribute ("ibuConfigRespAppID", PageContext.REQUEST_SCOPE))
CustomerID	((Long)pageContext.getAttribute ("ibuConfigCustomerID", PageContext.REQUEST_SCOPE))
CompanyID	((Long)pageContext.getAttribute ("ibuConfigCompanyID", PageContext.REQUEST_SCOPE))
CompanyName	(String)pageContext.getAttribute ("ibuConfigCompanyName", PageContext.REQUEST_SCOPE)
UserName	(String)pageContext.getAttribute ("ibuConfigUserName", PageContext.REQUEST_SCOPE))
FirstName	(String)pageContext.getAttribute ("ibuConfigFirstName", PageContext.REQUEST_SCOPE))
LastName	(String)pageContext.getAttribute ("ibuConfigLastName", PageContext.REQUEST_SCOPE))
user session	((oracle.apps.jtf.base.session.FWSession)pageContext.getAttribute ("ibuConfigFWSession", PageContext.REQUEST_SCOPE))
AppsContext	((oracle.apps.jtf.base.session.FWAppsContext)pageContext.getAttribute ("ibuConfigFWAppsContext", PageContext.REQUEST_SCOPE)).
Connection	((oracle.apps.jtf.base.session.FWAppsContext)pageContext.getAttribute ("ibuConfigFWAppsContext", PageContext.REQUEST_SCOPE)).getConnection()



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# Glossary

**account**

Account refers to the details or attributes of a deploying company's selling relationship with a party. A selling relationship can include orders or negotiated prices. Account attributes do not describe a party; they only exist when a selling relationship is present between the deploying company and the party.

**account number**

Number designated in the Trading Community Architecture (TCA) or Accounts Receivable (AR) and used to group account information about a party.

**account site**

A party site that is used within the context of an account, e.g., for shipping or billing purposes.

**business entity**

A branch, subsidiary, division, etc. of a company.

**company**

The entire business, including all business entities in the organizational structure.

**contact point**

A means of contacting a party other than sending physical mail, e.g., a phone number, e-mail address, telex number, fax number, etc.

**customer**

A person or organization with whom the deploying company has a selling relationship, regardless of whether anything has actually been purchased or

serviced. A selling relationship may be established by actually selling products, or it may be established by simply negotiating terms that will be used if you later sell products. In both scenarios, a *selling relationship* exists.

**deploying company**

The Oracle customer that has, or will, install, implement, and run all or part of the Oracle E-Business suite.

**DUNS Number**

A unique identifier used by Dun & Bradstreet, a major business data content provider. The DUNS number is an attribute in the TCA.

**GUI**

An acronym for Graphical User Interface.

**instance, item instance**

In Oracle Install Base, an instance is an occurrence of an item entity. For example, a manufacturer has a part number for a television he makes; each time he sells one television, an occurrence of this part number is recorded in Install Base

**location**

A point in geographical space described by a street address.

**merchant**

An Oracle E-business suite customers. Used to alleviate confusion with the term *customers*, which refers to customers of a business using Oracle products.

**multiple organizations (multi org)**

The ability to define multiple organizations and the relationships among them within a single installation of Oracle Applications. These organizations can be sets of books, business groups, legal entities, operating units, or inventory organizations.

**party**

An entity in the TCA that can enter into business relationships. A party is a real person, an organization, a branch, a subsidiary, a legal entity, a holding company, etc. In TCA, the attributes of a party are considered universal, i.e., they are independent of your selling or buying relationship with the party.

**party relationship**

In TCA, a binary relationship between two parties, such as a partnership. A party relationship can be a party itself, meaning certain party relationships can enter into relationship themselves.

**party site**

In TCA, the link between a party and a location that indicates the location is valid for that party. A party site is not intended to represent a distinct business entity with which you can do business.

**registration**

Refers to the process by which any user would gain access to application functionality.

**Registration Admin UI**

User Interface (UI) used by merchant administrator or any person granted privileges to maintain users and accounts.

**Registration Self-Service User UI**

User Interface (UI) that is used by individual users or business users to register themselves.

**registration template**

Part of the Oracle CRM JTF User Management Framework (JUMF), registration templates are JSP pages set up by the application administrator to capture accommodate user information-gathering requirements.

**responsibilities**

A grouping of application menus that determine the user interface accessible to a particular user.

**roles**

Groupings of permissions which are page- and function-level, granular privileges used to maintain application security.

**self-service registration**

Refers to the process of user self-registration through a self-service UI, as opposed to being registered by an administrator. Self-service registration includes the UI and background processes used to complete the registration processes (including assigning users the appropriate data access and UI access privileges).

**system administrator**

Also called sysadmin, the system administrator is a user who performs the highest-level administrator tasks in Oracle applications.

**TCA**

An acronym for Trading Community Architecture, sometimes used interchangeably with the Oracle Trading Community Model.

**Trading Community Model**

The Oracle Trading Community Model, also known as Trading Community Architecture (TCA).

**UI**

An acronym for User Interface.

**user**

Refers to any person who needs access to any application. This includes various types of customers, partners, suppliers, and employees.

**user types**

Users are categorized into types based on their registration requirements and access privileges. User types can be associated with default roles, responsibilities, accounts, registration templates, and approval requirements.

**user type, business**

A user with a selling relationship to the deploying company.

**user type, employee**

A user who is an employee of the deploying company.

**user type, individual**

A user with no selling relationship to the deploying company.

**user type, primary**

A designated person of a party, business entity, or internal group (for example, sales department) who is responsible for approving other users and resetting passwords.

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