Oracle® iSupport

User Guide

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Oracle iSupport User Guide, Release 11*i*

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You can send comments to us by electronic mail to 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.

Preface

Welcome to Release 11*i* of the *Oracle iSupport User Guide*. This guide is intended to be utilized in the understanding, administration, and usage of Oracle iSupport.

Audience for This Guide

To use this guide you need to 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 that 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 understand, administer, and use Oracle iSupport. It is organized into the following chapters:

Chapter 1 Understanding Oracle iSupport

This chapter contains conceptual details designed to aid in understanding the application and its various components.

Chapter 2 Administering Oracle iSupport

This chapter provides Oracle iSupport administrative users, including primary users, with task-based procedures for maintaining the application.

Chapter 3 Using Oracle iSupport

This chapter provides task-based procedures for using the application effectively. It is intended for general users of the application including business users, individual users, employee users, and guest users.

Typographic Conventions

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

Convention	Meaning
italic text	Book 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
boldface text	Menu, button, keyboard, and form 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 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 CRM Applications > Internet Business Applications > Oracle iSupport from the online help menu. Printed versions of the user and implementation manuals are available for purchase from Oracle Store (http://store.oracle.com) and Oracle 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 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 Oracle*MetaLink* (http://metalink.oracle.com).

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle 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 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 6*i* 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 Oracle*MetaLink*.

Oracle Manufacturing APIs and Open Interfaces Manual

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

Oracle Order Management Suite APIs and Open Interfaces Manual

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

Oracle Applications Message Reference Manual

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

Oracle CRM Application Foundation Implementation Guide

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

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle 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 Oracle9*i* server, and your hardware and software environment.

Oracl*eMetaLink*

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLink*, 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 Oracle*MetaLink*, register at (http://metalink.oracle.com). Bugs created against the Oracle iSupport application use the bug identifier number of 381.

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

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle

Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

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

About Oracle

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

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

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

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Understanding Oracle iSupport

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

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

For user/customer-facing procedures, see the Using Oracle iSupport topic group (online help) or chapter (PDF version) of the *Oracle iSupport User Guide.* (Often the PDF version of the documentation is more current than the online help version.)

For setup information regarding the application, see the *Oracle iSupport Implementation Guide*. The implementation guide is released in PDF, with the most recent version at Oracle*MetaLink* (http://metalink.oracle.com). Visit the Oracle Technology Network (http://otn.oracle.com/documentation) to order printed copies of the guides for Oracle iSupport.

Topics in this section include:

- Main Components of Oracle iSupport
- Oracle iSupport Dependencies and Integration Points
- Understanding User Management
- Understanding the Oracle iSupport Home Page
- Understanding Service Request in Oracle iSupport
- Understanding Account Management in Oracle iSupport
- Understanding Forums in Oracle iSupport

1.1 Main Components of Oracle iSupport

The main components of Oracle iSupport are:

- **Service Request** - This module enables users to submit and manage their service requests online. Service requests can be bookmarked by users for display on the home page, and the user can create and bookmark saved searches of submitted requests. Merchants using Service Request can offer or enforce knowledge base solutions as well as enforce product association during service request creation. Merchants can also set up and utilize customized templates that gather relevant service request information during service request creation.
- **Products** - Users have the ability to view their Oracle Install Base data as well as add products to it through the Products tab.
- **Forums** - Interactive forums allow customers to search for information, post questions, and share technical knowledge with other users.
- **Account Management** - The Account Management feature gives users online, 24-hour access to their invoices, payments, shipment information, returns, and service contracts. The Returns functionality allows users to create Return Material Authorizations (RMAs) online.
- **Homepage** - Users can personalize the home page with links to frequently-used data, such as service request activity and knowledge base search results. Merchants can display alerts, company news, and other important information on the home page.
- **Customer Communications** - The Contact Us feature allows users to submit call-back requests through the web at any time. The Surveys feature allows merchants to provide questionnaires to their users in order to gather relevant customer feedback.

1.2 Oracle iSupport Dependencies and Integration Points

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

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

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

- **Oracle CRM Technology Foundation** - Oracle CRM Technology Foundation is a prerequisite for implementation of any Oracle CRM module. The technology stack supplies debug logging trails and cookie encryption.
- **Oracle CRM Foundation** - Oracle CRM Foundation provides the framework for user registration and approvals.
- **Oracle Workflow** - In all Oracle applications, Oracle Workflow provides the ability to send e-mail notifications, and allows you to define various workflow processes required for normal business operations. Oracle Applications 11*i* comes with Oracle Workflow already installed as part of the Applications Object Library. For details on how Oracle iSupport uses Oracle Workflow, please see the chapter Integrating Oracle iSupport with Oracle Workflow, in the *Oracle iSupport Implementation Guide*.
- **Oracle Trading Community Architecture** - The 11*i* Oracle Trading Community Architecture, or the acronym TCA, consists of a database schema, APIs, and data quality management utilities that allow you to capture and exploit valuable information about your commercial community: organizations, people, places, and the network of relationships that bring them together. Oracle Trading Community is used by both Oracle ERP and Oracle CRM applications. In Release 11*i*, Oracle's customer model is TCA.
- **Oracle Accounts Receivable** - A central data repository for customer information that uses the TCA model, Oracle Accounts Receivable provides customer account data for Oracle iSupport. After a customer books an order in an Oracle CRM application, an account is created in Accounts Receivable. If a customer is directly created in Accounts Receivable, an account number is also generated. Accounts Receivable also calculates taxes and generates invoices.
- **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.
- **Oracle HRMS** - Oracle Human Resources Management Systems provides employee data for CRM and ERP applications, provided that you are not using a third-party application.
- **Oracle CRM Foundation** - CRM Foundation 11*i* supplies much of the data and functionality for Oracle iSupport. You must set up Foundation in order to

utilize Oracle iSupport. For more information, see the *Oracle iSupport Implementation Guide*.

- **Oracle Install Base and Oracle Inventory** - Oracle Inventory supplies the infrastructure that contains an organization's entire product repository and configuration. It integrates closely with Oracle Install Base, which is the repository of customer- or party-purchased products. Both Oracle Inventory and Oracle 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.
- **Oracle TeleService** - OracleTeleService, which includes Olacle Support, contains the Service Request functionality that allows customers to submit, view, edit, and manage their service requests online.
- **Oracle Contracts Suite** - Oracle Contracts Suite provides information on service contracts and warranties. You need to do a full installation of Contracts Suite in order to utilize this functionality. Contracts Suite comprises Contracts Core and Contracts for Service.
- **Oracle Order Management** - An Oracle ERP application, provides returns functionality within Oracle iSupport. You must set up Oracle Order Management for returns functionality.
- **Oracle Order Capture APIs** - Oracle Order Capture APIs provide returns functionality in Oracle iSupport.
- **Web Call-Back** - The Web Call-Back (Call Me) feature allows users to submit a call-back request through the Oracle iSupport UI. 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 modules. For further information, see the Setting up Call Back topic in the Implementation Tasks chapter.
- **Oracle Scripting** - Oracle iSupport uses Oracle Scripting to provide surveys functionality. Scripting also presents scripts to the desktop of an Interaction Center agent to aid customer service.

1.3 Understanding User Management

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

Note: The information in this section is meant to give you an overview of the concepts of the Oracle CRM User Management framework. More specific and comprehensive information can be found in the *Oracle Common Application Components User's Guide.*

The Oracle CRM User Management framework has four main components:

1. User Types
2. Enrollments/Subscription Services
3. Templates
4. Approval Process

1.3.1 User Types

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

The following sections discuss user types that pertain to Oracle iSupport, including:

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

Please see Other Users for a discussion of Oracle iSupport users who do not follow the predefined user types.

1.3.1.1 Primary User (Organization Contact)

Seeded as a user type in the Oracle CRM User Management framework framework, the primary user is also known as the customer administrator. This user typically:

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

- Adds/modifies roles to users within his party/organization

The Oracle CRM User Management framework supports any number of primary users.

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.

1.3.1.2 Business User (B2B)

Seeded as a user type in the Oracle CRM User Management framework, this user is a typical business-to-business user, associated with an organization other than the merchant utilizing Oracle iSupport.

1.3.1.3 Individual User (B2C)

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

1.3.2 Enrollments/Subscription Services

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

Enrollments are of two basic types:

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

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

The merchant implementing Oracle iSupport determines during implementation which enrollments will be explicit and which will be implicit to the user. For more information, see the *Oracle Common Application Components User's Guide*.

Sample Registration/Enrollments Scenario for a Business User

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

During implementation or setup, the application administrator (sysadmin) must configure User Types and implicit enrollments on the System Administrator Console. The administrator may also set up enrollments to which users can subscribe. See the *Oracle Common Application Components User's Guide* for more information on enrollments.

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

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

User A then enters the approval process. The Oracle CRM User Management framework comes with seeded approval processes that leverage Oracle Workflow for e-mail notifications. If User A logs in to the application before he is approved, then he sees a page that tells him that his approval is pending.

After User A is approved, he receives an e-mail notifying him of his approval, and then he can log in to the HTML login page. His application landing page depends upon the default responsibility assigned to him when he logs in.

For more information, see the *Oracle Common Application Components User's Guide*.

1.3.2.1 Understanding Responsibilities

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

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

For more information, see the *Oracle Common Application Components User's Guide*.

1.3.2.2 Understanding Roles

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

For more information, see the *Oracle Common Application Components User's Guide*.

1.3.2.3 Self-Service Support Over the Web Enrollment

The Oracle CRM User Management framework enrollment tied to Oracle iSupport is called the Self-Service Support Over the Web Enrollment. It is seeded within the Oracle 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 1–1 Self-Service Support Over the Web Enrollment Responsibilities

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

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

Table 1–2 Self-Service Support Over the Web Enrollment Roles

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

1.3.2.4 Modifying Seeded Enrollments

The seeded enrollments can be modified, and you can also create new enrollments. Consult the *Oracle Common Application Components User's Guide* for details.

1.3.3 Templates

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

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

Characteristics of registration templates include:

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

1.3.3.1 Defining New Registration Templates

New registration templates can be created using the System Administrator Console. Consult the *Oracle Common Application Components User's Guide* for details.

1.3.4 Approval Process

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.

1.3.4.1 Who Can Be an Approver?

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

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

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

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

1.3.4.2 Defining a New Approval Process

New approval processes can be defined on the System Administrator Console. Consult the *Oracle Common Application Components User's Guide* for details.

1.3.5 Other Users

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

- Oracle Applications System Administrator
- Oracle iSupport Administrator
- Employee User
- Knowledge Management Admin User
- Survey Administrator
- Guest User

1.3.5.1 Oracle Applications System Administrator

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

- *Oracle Applications System Administrator's Guide*
- *Oracle Applications Implementation Guide*
- *Oracle Applications Concepts*
- *Oracle Common Application Components User's Guide*

1.3.5.2 Oracle iSupport Administrator

The merchant implementing Oracle iSupport uses the sysadmin login to set up the Oracle iSupport Administrator. This is a required user. The Oracle iSupport Administrator is a user chosen by the merchant to perform routine but high-level administrative tasks, such as:

- Setting up users and assigning appropriate roles and responsibilities
- Setting up the application home page
- Setting up Service Request (Oracle Support/TeleService)
- Setting up Products tab/Install Base
- Setting up Knowledge Management

- Setting up Accounts Management functionality
- Setting up Forums
- Setting up Web Call-Back features
- Setting up Surveys

Instructions for setting up this user are in the *Oracle iSupport Implementation Guide*.

1.3.5.3 Employee User

The Employee User is not seeded as a User Type in the Oracle CRM User Management framework, but is supported for this release of Oracle iSupport. This type of user is an employee of the merchant using Oracle iSupport. This user is set up through the Forms interface by the Oracle iSupport Administrator. For information on setting up this type of user, see the Setting up iSupport Users topic in the Implementation Tasks chapter of the *Oracle iSupport Implementation Guide*.

1.3.5.4 Knowledge Management Administrator-User

This is a user who performs Knowledge Management setup and management. This user type is not seeded in the Oracle CRM User Management framework. This user is required only if the merchant will use the Knowledge Management functionality. For more information, see the Integrating Oracle iSupport with Oracle Knowledge Management chapter of the *Oracle iSupport Implementation Guide*.

1.3.5.5 Survey Administrator

This is a user who performs Surveys setup and management. This user type is not seeded in the Oracle CRM User Management framework. This user is required only if the merchant will use Surveys. For more information, see the Configuring Surveys topic of this guide.

1.3.5.6 Guest User

A guest user is a user who comes to the Oracle iSupport site and does not log in explicitly. A guest user facility is implemented in many online business applications as a way to allow users to preview a subset of functionality of an application before purchasing or registering for a product. With the guest user facility, unregistered users can access certain features in Oracle iSupport and registered users can access these features without having to log in.

Based on the roles and responsibility assigned to a guest user, the guest user can access the following features:

- View the home page for a guest user
- View technical libraries for a guest user
- View public solutions that can viewed by a guest user

1.4 Understanding the Oracle iSupport Home Page

The home page is the landing page for all users who log in to Oracle iSupport.

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

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

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

Topics in this group include:

- Understanding the Content Administration
- Home Page Seeded Content
- Home Page Non-Seeded Content

Related topic:

- Maintaining the Home Page

1.4.1 Understanding the Content Administration Page

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

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

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

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

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

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

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

View Status - The View Status column displays Employee, Customer, or Both. This setting indicates what classes of users can view the information. For example, if the status is Both, then both the Employee and the Customer type of user can view the information. Employees of the merchant (the company using Oracle iSupport) are in the Employee class, while persons registering from outside the company, that is, customers, are in the Customer class of user.

1.4.2 Home Page Seeded Content

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

Login - Bin containing a login prompt.

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

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

Alerts - Bin containing alerts.

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

Support Resources - (named the Quick Navigation Bin when viewed by an administrator) This bin allows a service provider to show navigational links in the bin by defining a menu and specifying this menu in a profile option.

Technical Library - Bin containing the same content as the Technical Library page.

Related topic:

- Maintaining the Home Page

1.4.3 Home Page Non-Seeded Content

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

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

Related topic:

- Maintaining the Home Page

1.5 Understanding Service Request in Oracle iSupport

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

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

1.5.1 Service Request Dependencies

This topic area discusses the Oracle iSupport service request dependencies.

1.5.1.1 Oracle TeleService

Oracle TeleService, which includes Oracle Support, provides the bulk of Service Request functionality in Oracle iSupport. The service request application tracks all service issues reported by customers and employees of the merchant. It does this by agent and customer input and integration with other Oracle applications. For more information, see *Oracle TeleService Implementation Guide.*

1.5.1.2 Oracle CRM Application Foundation

Service request processes are highly dependent upon modules of Oracle CRM Application Foundation:

- **Assignment Manager (Assignment Engine)** - 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** - 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** - Allows you to set up resources to determine the owners of service requests.
- **Territory Manager** - Allows you to define rules in Assignment Manager.
- The CRM Foundation modules Tasks, Calendar, Interaction History, and Fulfillment also provide functionality.

For more information, see:

- *CRM Application Foundation Implementation Guide*

1.5.1.3 Oracle Workflow

Oracle iSupport features the ability to create, update, and track service requests. It does this through integration with the Oracle Support portion of 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 Support. Oracle Workflow automatically notifies service personnel about their assignments based on service request. When a service request is escalated, Oracle Workflow processes and delivers the notifications regarding escalation activity.

Oracle iSupport also uses Oracle Workflow to submit service request details to users. This is done with the Email This to Me button during service request creation.

For more information, see the following guides:

- *Oracle Workflow Guide*

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

1.5.2 Understanding Service Request Templates

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

- Administrator-defined questions that gather information about service requests; these questions can be configured so that the user must answer them mandatorily.
- Administrator-defined free-form and choice-type answers that relate to the questions posed on the template.
- Weighting of answers used to determine severity of service requests automatically.
- Ability to associate a template with a specific product, urgency, request type, and problem code.

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

The information gathered from the templates assists in:

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

Related topic:

- Service Request Templates

1.6 Understanding Account Management in Oracle iSupport

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 Contracts for Service Implementation Guide*.

1.7 Understanding Forums in Oracle iSupport

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

2 Administering Oracle iSupport

This topic group provides task-based administrative procedures that are necessary for ongoing Oracle iSupport maintenance for this release.

For conceptual information *regarding* the application, see the Understanding Oracle iSupport topic group (online help) and chapter (PDF version) of the *Oracle iSupport User Guide*.

For general user/customer-facing procedures, see the Using Oracle iSupport topic group (online help) or chapter (PDF version) of the *Oracle iSupport User Guide.* (Generally, the PDF version of the documentation is always the most current.)

For setup information regarding the application, see the *Oracle iSupport Implementation Guide*. The implementation guide is released in PDF, with the most recent version at Oracle*MetaLink* (http://metalink.oracle.com). Please visit the Oracle Technology Network (http://otn.oracle.com/documentation) to order printed copies of the guides.

Topics in this section include:

- Maintaining Users
- Changing User Profile Information
- Mapping Technical Library Categories
- Maintaining the Home Page
- Maintaining Service Request Templates
- Configuring Surveys
- Configuring Call Back (Call Me)
- Administering Forums

2.1 Maintaining Users

For current information on user implementation, user roles, user responsibilities, and seeded user types, see the *Oracle iSupport Implementation Guide*, the *Oracle Common Application Components User's Guide*, and the *Oracle Common Application Components Implementation Guide.*

This topic group includes:

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

Related topics:

- Understanding User Management
- Changing User Profile Information

2.1.1 Creating Users

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

2.1.2 Deleting Users

Use the steps below to delete users from the application.

Steps

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

2.1.3 Setting Effective Dates for Users

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

Steps

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

2.1.4 Searching for Users

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

Steps

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

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

   Example 1:

Search for all users whose username begins with B:

a. Select Username from the drop-down list.

b. Enter in the field: `B%%`.

c. Select Go.

Example 2:

Search for all users whose last name contains an X:

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

b. Enter in the field: `%X%`.

c. Select Go.

Example 3:

Search for all users whose first name ends in ON:

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

b. Enter in the field: `%ON`.

c. Select Go.

2.2 Changing User Profile Information

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

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

2.2.1 Changing/Resetting Password

Follow the steps below to change or reset a password.

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

Steps

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

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

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

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

Steps

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

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

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

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

2.2.3 Adding/Changing Address Information

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

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

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

Steps

1. Log into the JTF login page as Oracle iSupport Administrator or Primary User.
2. Navigate to Administration > User.

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

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

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

2.2.4 Setting General Preferences

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

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

Steps

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

2.2.5 Changing Default Responsibility

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

Note: The default responsibility that is active at the time that a user logs in to the JTF login determines which application is initially accessed.

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

Steps

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

2.2.6 Changing Default Customer Account

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

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

Steps

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

3. Search for the user whose information you wish to alter. See Searching for Users for directions.
4. Select the underlined hyperlink of the appropriate username. The Personal Profile page appears.
5. Navigate to the Accounts link. The Accounts page appears.
6. Select the checkbox next to the desired default account.
7. Select Save. The application returns a confirmation message.

2.2.7 Setting Home Page E-mail Subscription

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

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

Prerequisites

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

Steps

1. Login to the JTF login as Oracle iSupport Administrator or Primary User.
2. Navigate to Administration > User.
3. Search for the user whose information you wish to alter. See Searching for Users for directions.
4. Select the underlined hyperlink of the username. The Personal Profile page appears.
5. In the menu to the left, select Support. The Support page appears.
6. In the Email Management: Subscription Content area, a list of available home page content appears. From the list, select the desired home page content.

7. In the Delivery Days area, choose the weekdays desired for e-mails.
8. In the Delivery Method area, select either HTML or Text as the type of e-mail.
9. Select Update Subscriptions. The application returns a confirmation message.

2.2.8 Setting User Signature for Forums

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

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

Steps

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

2.2.9 Adding/Changing Company Information

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

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

Steps

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

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

2.2.10 Viewing Administrators Information

Use the steps below to view a list of administrators for the application. Generally, these are users who are Oracle iSupport Administrators or Primary Users.

Steps

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

2.3 Mapping Technical Library Categories

You can display different Technical Library content to different sets of users like business users, individual users, employees, and guest users. This is achieved by associating a top-level category for Technical Library with multiple responsibilities and displaying to users the MES category linked to the responsibility with which they are currently logged in. With the Category Administration setup page you can select an MES category and assign it to a responsibility. The Technical Library page and the technical library bin then show the category that corresponds to the current responsibility of a user. Use this procedure to make the association.

Steps

1. Log in to the JTF login as Oracle iSupport Administrator.
2. Navigate to Administration > Support > Technical Library. The Category Administration page appears.
3. Use the Category LOV to associate a responsibility name with a category. A category can be associated with multiple responsibilities.
4. Select Update to save your assignments.

2.4 Maintaining the Home Page

This topic group provides information on the following tasks:

- Using the Content Administration page
- Enabling Home Page E-mails

2.4.1 Using the Content Administration Page

In the Content Administration page you can view all the contents defined for the home page and perform the following actions:

- Design mandatory home page content
- Edit content properties
- Add content
- Add MES content
- Delete content

2.4.2 Designing the Mandatory Content of the Home Page

You can set information on the home page 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 page as the Oracle iSupport Administrator.
2. Navigate to Administration > Homepage. The Content Administration page appears.
3. Select the Mandatory Layout link. The Mandatory Layout for Home Page page appears.

   Here you can define a mandatory layout for home page for different user types like customer, employee, and guest user.
4. In the Define Mandatory Layout For LOV, select a user type and select GO. The page updates itself with the current layout information for that user type.
5. Use the arrows to move selected bins to design the desired layout for the home page for the selected user type.
6. Select Update. You are returned to the Content Administration page.

2.4.3 Editing Content Properties

Follow these steps to edit the properties of a content bin.

Steps

1. Log in to the JTF login page as the Oracle iSupport Administrator.
2. Navigate to Administration > Homepage. The Content Administration page appears.
3. To edit a particular bin, select its name link under Content Name. The Edit Content Properties page appears.
4. Use the checkboxes and LOVs to define the general characteristics of the bin, access control, and the default number of rows displayed.

   In the Content Access Control region, setting the value of Disabled to Yes makes the bin inaccessible to the general user.
5. Select Update to save your changes. You are returned to the Content Administration page, which summarizes your changes.

2.4.4 Adding Content to the Home Page

Follow these steps to define the properties of a new content bin.

Steps

1. Log in to the JTF login page as the Oracle iSupport Administrator.
2. Navigate to Administration > Homepage. The Content Administration page appears.
3. Select Add Content. The Add Content page appears.
4. Use the checkboxes and LOVs to define the general characteristics of the bin, access control, and the default number of rows displayed.

   In the Content Access Control region, setting the value of Disabled to Yes makes the bin inaccessible to the general user.
5. Select Save to save your definition. You are returned to the Content Administration page, which summarizes your new content.

2.4.5 Adding MES Content to the Home Page

Oracle Marketing Encyclopedia System (MES) supplies some data for the home page, for example, the Alerts and Company News bins. You can also publish other types of information in MES and select it as home page content in Oracle iSupport.

Prerequisites

- Set up MES.
- Publish content within MES.

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 page as the Oracle iSupport Administrator.
2. Navigate to Administration > Homepage > Add MES Content (bottom of page).
3. In the Add MES Content page, select the content that you wish to add by selecting the appropriate checkbox.
4. Select Save.

   The Content Administration page appears and shows your new content.

2.4.6 Deleting Content from the Home Page

Deleting content from the Content Administration page removes content from current home pages and removes it as a building block for future ones. Use this procedure to delete a content bin.

Steps

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

   The Content Administration page appears.
3. Select the checkbox next to the content name whose content you want to delete.
4. Select Delete Content.
5. In the confirmation page, confirm your deletion.

The Content Administration page shows that your selected content bin has been removed.

2.4.7 Enabling Home Page E-Mail Subscription

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

This topic contains the following subtopics:

- Setting up subscription template
- Running concurrent programs

Prerequisites

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

2.4.7.1 Setting up Subscription Template

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

Steps

1. Log in to the JTF login as Oracle iSupport Administrator.
2. Navigate to Administration > Homepage > Subscription.

   The Subscription Template Administration window appears.
3. In the Subject text field, enter the name of the subscription template.
4. In the Header and Footer fields, enter the information you wish to display in the header/footer area of the template. Use the Clue Word/Description table (copy and paste as desired) at the bottom of the page to build the header/footer.
5. Select Update.

   A confirmation message appears.

2.4.7.2 Running the Subscriptions Concurrent Program

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

2.5 Maintaining Service Request Templates

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

Oracle TeleService, which now includes what was previously known as Oracle Support, provides the bulk of service request functionality in Oracle iSupport. For any service request functionality in Oracle iSupport, you must do a full installation of Oracle TeleService/Support.

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

- *Oracle TeleService User Guide*
- *Oracle TeleService Implementation Guide*
- Understanding Service Request in the Understanding Oracle iSupport section of this guide
- Integrating Oracle iSupport with Service Request chapter of the *Oracle iSupport Implementation Guide*

This topic area includes:

- Creating New Templates
- Defining Template Parameters
- Defining Questions/Answers on Templates
- Setting Severity Thresholds for Templates
- Setting the Default Template
- Using the Save As Feature to Create New Templates
- Renaming Existing Templates
- Disabling Templates

2.5.0.3 Creating New Templates

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

Prerequisites

None

Steps

1. Log in to the JTF login as Oracle iSupport Administrator.
2. Navigate to Administration > Support > Request Template. The Service Request Template page appears.
3. Select Create Template. The Create Template: Template Information page appears.
4. In the Name field, enter a meaningful name for the new template.
5. Optionally, select the calendar icon next to the Effective Start Date field and choose an effective start date for the template. Do the same for Effective End Date.

   Note: It is recommended that you use the Effective End Date function to disable existing templates as opposed to deleting them.
6. Select Continue. The Create Template: Template Details page appears.
7. Select Update. The page indicates that it has been updated.
8. Select Back. The Service Request Template page appears and shows your new template name in the Template Name field.
9. Select the hyperlink of the template name and continue creating the template by:
   - Defining Template Parameters
   - Defining Questions/Answers on Templates
   - Setting Severity Thresholds for Templates

2.5.0.4 Defining Template Parameters

You can associate products, urgencies, problem codes, and requests as parameters for a service request template. Use the steps below to associate these parameters with a template.

Prerequisites

- Oracle Support has been installed and configured. See the *Oracle TeleService Implementation Guide* for details.
- A service request template has been created in Oracle iSupport.
- Products have been set up in Oracle Inventory.

Steps

1. Log in to the JTF login as Oracle iSupport Administrator.
2. Navigate to Administration > Support > Request Template. The Service Request Template page appears with a list of templates.
3. Select the underlined hyperlink of the appropriate template. The Template Details page appears.
4. In the Template Information region, select Template Parameters. The Template Parameters page appears.
5. In the Products region, select Add Products. The Available Products page appears.
6. Select the Add checkbox for each associated product that you want to add, and select Add. The page refreshes itself without the added products.
7. Select Back. The Template Parameters page appears showing the added products.
8. In the Urgencies region, select Add Urgencies. The Available Urgencies page appears.
9. Select the Add checkbox for each associated urgency that you want to add, and select Add. The page refreshes itself without the added urgencies.
10. Select Back. The Template Parameters page appears showing the added urgencies.
11. In the Problem Codes region, select Add Problem Codes. The Available Problem page appears.
12. Select the Add checkbox for each associated problem that you want to add, and select Add. The page refreshes itself without the added problems.
13. Select Back. The Template Parameters page appears showing the added problems.

14. In the Request Types region, select Add Request Types. The Available Request page appears.
15. Select the Add checkbox for each associated request that you want to add, and select Add. The page refreshes itself without the added requests.
16. Select Back. The Template Parameters page appears showing the added requests.

2.5.0.5 Defining Template Questions and Answers

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

Prerequisites

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

Steps

1. Log in to the JTF login as Oracle iSupport Administrator.
2. Navigate to Administration > Support > Request Template. The Service Request Template page appears with a list of templates.
3. Select the underlined hyperlink of the appropriate template.

   The Template Details page for the template appears. The Template Details region lists any questions associated with the template. If none is associated, then an empty list appears.
4. In the Template Details region, select one of these two options:
   - Create Individual Note for Each Question
   - Create a Single Note for all the Questions

   Creating an individual note for each question has the advantage that the application can pass responses to Knowledge Management that have meaningful search criteria.
5. Select Add Question. The Define Question and Answer page appears.
6. In the Question region, enter a question for the template in the empty Question text box.
7. 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.

8. Select Continue. The application updates the page.
9. 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, select No.
10. If your question requires a choice-type answer, then select (yes/no) whether you want the answer to be used in the severity scoring (see Set Severity Thresholds below). If you choose yes, then answers to the question will be weighted from 0 through 10 during the answer setup (see Set up Answers for a Choice Question below).
11. In the Answer region, enter an answer for the question in an empty Value text box. The answers you set up here become an LOV for the end user, and the answer you select as a default will appear as the default answer on the user side.
12. For each choice-type answer, set a score of 0 through 10.

    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 Defining Severity Thresholds, below).
13. Select Add. The choice is added to the list of answers.
14. To sort the answers, select Sort and use the up and down arrows in the Sort Answers page to arrange the questions in the desired order for the LOV. Select Update.
15. Select Back to return to the Define Question and Answer page.
16. For text-type questions, you do not need to determine answers. Instead, in the Answer region, select the number of rows that the user is limited to when typing in the answer.
17. Select Back. The Template Details page appears.
18. To sort the questions, select Sort and use the up and down arrows in the Sort Questions page to arrange the questions in the desired order. Select Back to return to the Template Details page.

19. To edit a question, select the hyperlink of the question that you wish to modify.

2.5.0.6 Defining Severity Thresholds for Templates

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

Prerequisites

- Oracle Support has been installed and configured, including the setup of severities. See the *Oracle TeleService Implementation Guide* for details.
- A service request template has been created in Oracle iSupport.

For more information, see:

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

Steps

1. Log in to the JTF login as the Oracle iSupport Administrator.
2. Navigate to Administration > Support > Request Template. The Service Request Template page appears with a list of templates.
3. Select the underlined hyperlink of the appropriate template. The Template Details page appears.
4. Use the Set Severity region to set severity thresholds for the template. The names of the severities listed on this page (for example, high, medium, and low) come from the severity setups in Oracle TeleService.

   The application determines the sum score from all of the scorable answers assigned to answers in the Defining Template Questions and Answers section and compares it to the total possible. The application then determines the difference as a percentage and assigns the appropriate threshold. See the example below for clarification.

   You do not need to define thresholds for all of your severities, only the ones you wish to use. You can select one of the severities as a default and all templates will use that severity. The application ignores severities for which you do not define thresholds.

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. The user can select only 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. Because the user can select only one answer per question, the highest possible score in this scenario is 10 (The highest score for each question is 5, and 5 plus 5 is 10). The user cannot see these scores.

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

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

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

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

5. When you have finished entering severity thresholds, select Update.

2.5.0.7 Setting the Default Template

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

Only one default template is allowed.

Prerequisites

- Oracle Support has been installed and configured. See the *Oracle TeleService Implementation Guide* for details.
- A Service Request template has been created in Oracle iSupport.

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.

Using the Save Template Feature to Create New Templates

The Save Template feature of service request templates is helpful when you already have a template set up and wish to use it as a model or prototype when creating a new template. Use the following procedure to use the Save Template feature.

Steps

1. At the JTF login, log in as the Oracle iSupport Administrator.
2. Navigate to Administration > Support > Request Template. The Service Request Template page appears with a list of templates.
3. Select the underlined hyperlink of the model template. The Template Details page appears.
4. In the Save Template region, enter a value for New Template Name.
5. Select Save Template.
6. Select Back. The Service Request Template page appears and shows the new template in the list of templates.
7. Edit the template as desired.

2.5.0.8 Renaming Existing Templates

Follow the steps below to rename a service request template.

Steps

1. At the JTF login, log in as Oracle iSupport Administrator.
2. Navigate to Administration > Support > Request Template.
3. Select a template. The Template Details page appears.
4. In the Name field, enter the new name for the template.

5. Select Update.

2.5.0.9 Disabling Templates

Follow these steps to disable a template.

Steps

1. Log in to the JTF login as Oracle iSupport Administrator.
2. Navigate to Administration > Support > Request Template. The Service Request Template page appears with a list of templates.
3. Select the underlined hyperlink of the template that you want to delete or disable. The Template Details page appears.
4. Select the calendar icon next to the Effective End Date field and choose an effective end date for the template.

   It is recommended that you end-date a template to disable it, rather than remove it by using the Remove checkbox on the Service Request Template page.
5. Select Update to save changes.

2.6 Configuring Surveys

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

2.6.1 Setting Up Oracle Scripting

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

Oracle Scripting consists of 3 components:

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

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

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

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

2.6.2 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* and *Oracle Scripting User Guide*.

2.6.3 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 Setting up the Oracle iSupport Users topic in the *Implementation Tasks* chapter of the *Oracle iSupport Implementation Guide* for details on how to set up users.

Steps

1. Log into Oracle iSupport as the Oracle iSupport Administrator.
2. Select Administration > User. The All Users page appears.
3. 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.
4. In the User Details page, select Responsibilities.
5. In the Responsibilities page, select the underlined hyperlink of the word, **`Select`**. A list of responsibilities appears. If necessary, search for the Survey Administrator responsibility. After you have found it, select the Survey Administrator responsibility.

   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.

6. Save your work.

2.6.4 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, then 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 page, select Create.

3. In the Create Resource page, 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 **`ibupfbgl.jsp`** in the File Name field for the Final page file. This is the Oracle iSupport JSP which lists the surveys that you set up.

4. Navigate to Survey Campaign > Survey Campaign. Select the Create button.

5. In the Create Survey page, 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.

2.6.5 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) with 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 the survey and usergroup in Oracle iSupport.

2.6.5.1 Set Up a 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 page as the Oracle iSupport Administrator.
2. Navigate to Administration > Support > Usergroup > Create.

   The User Group Detail page appears.
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 (that is, all employees) from the fnd_user table.

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

8. Select Save.

2.6.5.2 Run Usergroup Creation Concurrent Program

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

2.6.5.3 Select Survey and Usergroup to Associate with Survey

Use the following steps to associate the usergroups with surveys that you have created in iSurvey. Only members of the usergroups are able to view and respond to surveys.

Steps

1. Log into Oracle iSupport as the Oracle iSupport Administrator.
2. Navigate to Administration > Support > Survey.

   The Survey Administration page appears with a list of selected survey deployment names and rows with blank fields for adding names.
3. To select a new survey deployment name, select the flashlight icon in a blank row to open a page with which you can pick a survey deployment name.

   After making your selection, you are returned to the Survey Administration page, and the new survey deployment name appears in the formerly blank row.
4. To associate a user group with a survey deployment, select the Associate link for that survey deployment name.

   The User Groups Associated with the Survey Deployment page appears with a list of associated groups and rows with blank fields for adding groups.
5. To add another user group name to the list of names, select the flashlight icon in a blank row to open the Search User Group page.

6. Use the page to search for a subset of user group names, and then select from the resulting set of displayed names.

   After making your selection, you are returned to the User Groups Associated with the Survey Deployment page, and the new user group name appears in the formerly blank row.

7. Select any user group that you want to remove from the association by selecting its Remove checkbox.
8. Select Save to make your changes to the list of user group names.
9. Select Back to return to the Survey Administration page.
10. Select any survey deployment name that you want to remove from the page by selecting its Remove checkbox.
11. Select Save to save your changes.
12. To respond to a created survey, log into Oracle iSupport as a member of a user group associated with a survey, and navigate to Support > Survey.

2.6.6 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. Select the Update button to save changes.

2. In iSurvey, navigate to Response > Survey Campaign.

   The Survey Campaign Responses page appears.

3. Follow the steps and guidelines documented in the *Oracle Scripting User Guide* to view and manage your survey results.

2.7 Configuring Call Me

The Web Call-Back (Call Me) feature allows users to submit a call-back request in Oracle iSupport. The web call-back requires implementation of the following:

- Oracle 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 Oracle Interaction Center documentation available on Oracle*MetaLink*.

Outside of Oracle iSupport, the call routing process is essentially this: After a user makes a call-back entry, Oracle iSupport sends the request to the CCT server group specified by the Oracle iSupport Administrator on the Oracle iSupport page. 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 the user) and assigns it to the UWQ client, and the call request immediately pops up in an agent’s page 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 in the Oracle iSupport UI.

Refer to Oracle CRM Interaction Center documentation for information on setting up the underlying products that 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 Administration > Support > Call Me.

   The Call Me Administration page appears.
3. Select a call center server group from the LOV.
4. Select a default note type from the LOV.
5. Select Update to save the data.

2.8 Administering Forums

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

This topic group provides information on the following:

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

2.8.1 Creating Categories

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

Related topic:

Creating Forums

Steps

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

   The Create New Category page 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 as at the Category Root level. Thus, for the first one, leave the Choose a parent category field set to Category Root.

   Guidelines for creating additional categories:

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

- Select the parent category to create a sub-category within a category.

4. Enter a name for the category in the Enter the name of the new category field.
5. Select an Access Type:

   Open - All users can view/access.

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

   Close - This option closes the category or forum to all users except the Oracle 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.

2.8.2 Creating Forums

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

Related topic:

- Creating Categories

Steps

1. At the JTF login, log in as the Oracle iSupport Administrator.
2. Navigate to Administration > Forum > Forum > Create. The Create New Forum page appears.
3. You can choose to have the forum exist at the topmost (root) level, or you can structure the new forum to be a topic area within a category.

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

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

4. Enter a name for the forum in the Enter forum name field.
5. Select an Access Type:

Open - All users can view/access.

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

Close - This option closes the category or forum to all users except the Oracle 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.

2.8.3 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.

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

2.8.3.1 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 page as the Oracle iSupport Administrator.
2. Navigate to the Forum tab.
3. To change the access type of a category, navigate to Administration > Forum > Category > Modify Status.

   The Modify Access Status page appears for either forums or categories.
4. Select the category or forum you wish to restrict.

5. In the Choose access type area, select the Restricted radio button.
6. Select Next or Modify, depending upon which button appears. Respond to the confirmation message.

2.8.3.2 Create Usergroup

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

Steps

1. Log in to the JTF login page as the Oracle iSupport Administrator.
2. Navigate to Support > Usergroup > Create.

   The User Group Detail page appears.
3. Enter a unique name for the usergroup in the Name field.
4. Select a effective date for the usergroup using the Start Date calendar icon.
5. Select an ending date for the usergroup using the End Date calendar icon.

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

   Sample SQL Usergroup Statement

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

2.8.3.3 Running Usergroup Creation Program

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

2.8.3.4 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 page appears.

2.8.4 Using Forum Moderators

A forum moderator is a user designated to handle some administrative tasks for message threads (groups of related messages).

Forum moderators can:

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

Forum moderator cannot:

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

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

2.8.4.1 Create Forum Moderator

Use the procedure below to create a forum moderator.

Steps

1. Log in to the JTF login page 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 page appears.
5. Select the Add button under Moderator List area. The Add Moderator page appears.
6. Enter the name of the user who will be the forum moderator. If necessary, search for the user. See Searching for Users for more details on how to search for users.
7. After you have entered the appropriate name in the field, select Add. A confirmation message appears.

2.8.4.2 Delete Forum Moderator

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

Prerequisite

A forum moderator has been created.

Steps

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

2.8.5 Maintaining Categories

This topic group contains information on the following tasks:

- Deleting Categories
- Renaming Categories

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

2.8.5.1 Deleting Categories

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

Steps

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

2.8.5.2 Renaming Categories

Use the steps below to rename a category.

Steps

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

2.8.6 Maintaining Forums

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

- Deleting Forums
- Renaming Forums
- Moving Forums

- Modifying Forum Attributes

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

2.8.6.1 Deleting Forums

Use the steps below to delete a forum.

Steps

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

2.8.6.2 Renaming Forums

Use the steps below to rename a forum.

Steps

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

2.8.6.3 Moving Forums

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

Steps

1. At the JTF login, log in as the Oracle iSupport Administrator or Forum Moderator.
2. Navigate to Administration > Forum > Forum > Move. The Move Forum page appears.

3. From the Choose a forum to move drop-down box, select the appropriate forum.
4. Select a destination category from the Choose its destination Category drop-down box.
5. Select Move. Respond to the confirmation message.

2.8.6.4 Modifying Forum Attributes

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

- Add New Attribute
- Modify Existing Attribute
- Delete Attribute

Add New Attribute

Follow these steps to add an attribute.

Steps

1. At the JTF login, log in as the Oracle iSupport Administrator.
2. Navigate to Administration > Forum > Forum > Modify Attributes. The Modify Forum Attributes page appears.
3. Select the appropriate forum from the drop-down list.
4. Select Next. The Modify Forum Attribute page reappears. Under Attribute List, select Add New Attribute. The Add Forum Attributes page appears.
5. Enter the name of the new attribute in the Header Name field.
6. Activate the Mandatory checkbox only if you want to require users to fill in an attribute when posting to the forum.
7. Enter the value of the attribute in the Header Value field. The optional header value field will become the default value for this attribute.
8. Select Save. Respond to the confirmation message.

Modify Existing Attribute

Follow these steps to modify an existing forum attribute.

Steps

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

Delete Attribute

Follow these steps to delete an attribute.

Steps

1. At the JTF login, log in as the Oracle iSupport Administrator.
2. Navigate to Administration > Forum > Forum > Modify Attributes. The Modify Forum Attributes page appears.
3. Choose the forum whose attribute you wish to delete from the drop-down list.
4. Select Next. The Modify Forum Attribute page reappears.
5. Select the Delete underlined link next to the appropriate attribute.
6. Respond to the confirmation message.

2.8.7 Maintaining Messages

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

- Deleting Messages
- Moving Messages

- Changing the Active Status of Message Threads
- Changing the Distribution Status of Message Threads

2.8.7.1 Deleting Messages

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

Steps

1. At the JTF login, log in as the Oracle iSupport Administrator or Forum Moderator.
2. Navigate to Administration > Forum > Messages.

   The Message Management page appears.
3. From the drop-down list, select the forum that contains message to be deleted.
4. Select Next.

   The Message Management page displays a list of all messages in the forum, the dates they were posted, and the authors' names.
5. To expand all threads, select Expand All. To collapse all threads, select Collapse All.
6. To delete a message, select the checkbox next to the message and then select Delete.
7. To delete a message thread, select all of the messages in the thread and then select Delete.

2.8.7.2 Moving Messages

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

Steps

1. At the JTF login, log in as the Oracle iSupport Administrator.
2. Navigate to Administration > Forum > Messages.

   The Message Management page appears.
3. From the drop-down list, select the forum that contains message to be moved.
4. Select Next.

The Message Management page appears with a list of all messages, the dates they were posted. and the authors' names.

5. To expand all threads, select Expand All. To collapse all threads, select Collapse All.
6. To move a message, select the checkbox next to the message you wish to move and then select Move.
7. To move a message thread, select all of the messages in the thread and then select Move.
8. From the drop-down list, select the destination forum for the message and select Ok.
9. A confirmation page appears.

2.8.7.3 Changing the Active Status of a Message Thread

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

Steps

1. At the JTF login, log in as the Oracle iSupport Administrator or Forum Moderator.
2. Navigate to Administration > Forum > Messages.

   The Message Management page appears.
3. From the drop-down list, select the appropriate forum.
4. Select Next.

   The Message Management page appears with a list of all messages, the dates they were posted, and the authors' names.
5. In the Active Status column, select either Open or Close from the drop-down list.

   Close status disables the message(s).

2.8.7.4 Changing the Distribution of a Message Thread

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

Steps

1. At the JTF login, log in as the Oracle iSupport Administrator or Forum Moderator.
2. Navigate to Administration > Forum > Messages.

   The Message Management page appears.
3. From the drop-down list, select the appropriate forum.
4. Select Next.

   The Message Management page appears with a list of all messages, the dates they were posted and the authors' names.
5. In the Distribution Column, select either Public or Internal from the drop-down list.

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

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

3

Using Oracle iSupport

This topic group provides process-oriented, task-based procedures for using Oracle iSupport for Release 11*i*. This topic group covers general user navigation and page functionality, and explains how to use the fields and other relevant elements within the pages.

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

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

For setup information regarding the application, please see the *Oracle iSupport Implementation Guide*. The implementation guide is released PDF, with the most recent version at Oracle*MetaLink* (http://metalink.oracle.com). Please visit the Oracle Technology Network (http://otn.oracle.com/documentation) to order printed copies of the guides.

Topics in this section include:

- User Interface Basics
- Performing Searches
- Using the Home Page
- Using Service Requests
- Using Accounts
- Using Returns
- Using Products/Oracle Install Base

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

3.1 User Interface Basics

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

- **Configurability -** Because the user interface of Oracle iSupport is highly configurable, you may or may not see what is described in this guide. Configurability affects both the application content pages that Oracle delivers and local pages that your support group can attach to application pages. Examples of the first category are regions, buttons, and fields on application pages that are visible to different types of users. Examples of the second category are advertisement sections that are attached to the top, left, right, and bottom of application pages. Your system administrator, application administrator, and end users control what is appropriate to display to particular users.
- **Go Button** - The Go button next to certain text boxes allows you to access a list of values (LOV) associated with that field. It is used to select items to enter into the text box. After the LOV pops up, select the entry of your choice using the radio button. On most LOVs you need to select Submit for the text box to be populated.
- **Drop-List -** A box with a down arrow next to it indicates that you select an entry from a drop-down list. Select the down arrow and make your selection with the mouse.
- **Required Fields -** An asterisk next to any field indicates that the entry is mandatory.
- **Calendar Icon -** The Calendar icon is used to set start or end dates for applicable procedures. Select the icon to view a calendar, then select a date to populate appropriate field.
- **Using the Tabs -** The business user interface has five main tabs, each with its own set of subtabs:
  - **Home -** This tab accesses the home page for the application. Your personalized home page consists of bins containing links to frequently used information that you set up (such as tracked Service Requests), and items

supplied by the application administrator, such as links to Technical Library documents or Support links. The home page has no subtabs. See Using the Home Page for more information.

- **Accounts** - The Accounts tab gives users access to transactions information, such as order details, invoices, payments, returns, contracts, shipments, and products in Oracle Install Base. Account tab subtabs are: Orders, Invoices, Payments, Contracts, Returns, and Products. See Using Accounts for more information.
- **Support** - By accessing the Support tab, users can create and track service request information, search the knowledge base, request call-backs from support agents, and access online forums. Support tab subtabs are: Ask Me, Technical Library, Forum, View/Update Request, and Create Request. See Using Service Request, Requesting a Support Call-Back, and Responding to Surveys for more information.

Note: Employee Users see only the Home and Support tabs.

3.2 Performing Searches

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

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

For information on searching the knowledge base, see the *Oracle Knowledge Management User Guide*.

3.2.1 Using Quick Find

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

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

Quick Find can help you locate:

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

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

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

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

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

3.2.2 Searching Service Requests

Oracle iSupport allows you to search for service requests that you have created and others to which you are given access. Use the following procedure to search for service requests.

Steps

1. Within Oracle iSupport, navigate to Support > View/Update Request > Search. The Search Service Requests page appears.
2. Enter values, as desired, for the following:

   Service Request Number - Enter an exact service request number.

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

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

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

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

Account Number - Select the appropriate account number. Or, leave set to All to capture information from all accounts associated with this user. This account number is the one for the user in the Trading Community Architecture. Depending on setup, account number can be optional in the creation of a service request.

Request Type - Select All or a reduction criteria of the request type used when the request(s) was created. The types available are limited to those that are mapped to your current responsibility.

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

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

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

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

3.2.3 Searching Account Information

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

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

Steps

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

3.2.4 Searching Oracle Install Base

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

3.2.5 Searching Forums

Follow the guidelines below to use the Forums search function.

1. Within Oracle iSupport, navigate to Support > Forum > Advanced Search. The Advanced Search - Forum page appears.
2. Enter data in any one or all of the following fields:

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

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

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

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

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

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

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

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

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

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

3.2.5.1 Forum Search Results

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

Subject Name - Message header or subject.

Author - Name of the person who posted the message.

Date - Date that the message was posted.

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

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

3.2.6 Searching Preselected MES Items

Oracle Marketing Encyclopedia System (MES), also known as Technical Library, enables searching within Oracle iSupport technical documents. These documents may include, for example, white papers, user guides, and frequently asked questions. Quick Find is the most complete way to search the Technical Library, but you can also view the subset of items that your administrator has preselected. Guest users can view documents listed under the MES category tied to the guest user responsibility on the Technical Library page. Use this procedure to view the Technical Library items that your administrator has selected.

Steps

1. Within Oracle iSupport, navigate to Support > Technical Library.

   Technical Library items that have been set up by the application administrator in MES appear in the Top Technical Documents page.

2. To view a category and/or document, select the appropriate link.
3. Drill down to a document.
4. Download the document, browse, and search it with the appropriate viewing software.

3.3 Using the Home Page

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

Guest users are able to access a home page that contains useful information relating to the product and their company through various data bins and pathways to the application by means of a login section, hyperlinks, and menu tabs. This page is configurable by the system administrators of merchants to reflect the type of information that they want to expose to a guest user. The system administrator can also control data content of the various bins.

The functions that a guest user cannot perform are:

- Select content on the home page
- Personalize the look and feel of the home page

- Close the bins shown
- Personalize any of the bins by defining views, for example, in service request bins
- Sign out

If you are a registered user, the following topics can assist you in setting up and maintaining the home page. Guest users have a subset of the functions described in these topics:

- Choosing Home Page Content
- Changing Home Page Display
- Enabling Home page E-mail Subscription
- Tracking Service Requests on the Home Page

3.3.1 Choosing Home Page Content

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

Follow the steps below to select the content for your home page.

1. Within Oracle iSupport, navigate to Home > Content. A list of content choices appears.
2. Choose topics from the Optional Content list by selecting in the checkbox next to the content topic. Wide (W) content can only be displayed in a wide column; narrow (N) content can be displayed in either size column. A wide column is twice as wide as a narrow column.
3. After making your selections, select Update to save changes.
4. Return to the home page to verify that you can see the content.

3.3.1.1 Using the Edit Hyperlinks on Home Page Bins

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

3.3.1.2 Using the Close Hyperlinks on Home Page Bins

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

Related topic:

Tracking Service Requests on the Home Page

3.3.2 Changing Home Page Display

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

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

Steps

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

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

   Note: You are not able to change the display of mandatory content (content that is set by the administrator to be required on your home page). Mandatory content items are marked with an asterisk (*).
5. Select Update to save changes. You are returned to the home page, where you can verify that the changes were made.

3.3.3 Enabling Home Page E-mail Subscriptions

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

Prerequisite

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

Steps

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

3.3.4 Tracking Service Requests on a Home Page

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

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

Sections in this topic group are:

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

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

3.3.4.1 Setting up Service Request Bin

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

Steps

1. Within Oracle iSupport, navigate to the home page.
2. Select the Edit link on the Service Request bin (not the Service Request Quick Links bin). The Edit Service Requests Content page appears.
3. Select Create View. The Create Service Request View page appears.
4. Choose values for the following:
   - **View Name** - Enter a name for the view in the View Name field.
   - **Rows per Page** - Enter a value for the number of rows to appear in the bin.
   - **Default View** - Select Default View to make this view the default that appears. The default view will be the one appearing on the home page. This is useful if you have more than one view set up.
5. In the Filters area, enter values that determine which service request characteristics will appear in the bin. Enter values, as desired, for the following:
   - **Service Request Number** - Enter a specific Service Request number if you wish the bin to display information about a specific service request.
   - **Project Number** - Enter a specific Project Number number if you wish the bin to display information only from a specific project tied to a created Service Request.
   - **Help Desk Number** - Enter a specific Help Desk Number number if you wish the bin to display information only from a specific help desk number tied to a created Service Request.
   - **Date Created** - Select the date range within which the requests you wish to display were created.
   - **Last Update Date** - Select the date range that the requests you wish to display were last updated.
   - **Account Number** - Select the appropriate account number. Or, leave set to All to capture Service Requests for all accounts associated with this user. This account number is the account number for the user in the Trading Community Architecture.

- **Request Type** - Select All or a reduction criteria of the request type used when the request(s) was created. The types available are limited to those that are mapped to your current responsibility.
- **Status** - Select All or a reduction criteria of the status of the request(s).
- **Urgency** - Select All or a reduction criteria of the urgency of the request(s).
- **Product** - Select a product for which requests have been created.

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

   Note: You must select at least one Display Option.

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

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

3.3.4.2 Setting up Service Requests Quick Links Bin

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

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

Steps

1. Within Oracle iSupport, navigate to the home page.

2. Select the Edit button on the Service Request Quick Links bin (not the Service Request bin). The Edit Service Request Quick Links Content page appears.
3. In the Display Options area, select service request characteristics that you wish to include from the Options window and move them to the Selected Options window using the arrow button (>).

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

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

3.3.5 Using the Quick Links Bin

Knowledge base results can be bookmarked and organized into a bin on your home page by utilizing the Add to Quick Links button on applicable pages.

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

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

Steps

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

3.4 Using Service Requests

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

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

- Searching Service Requests

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

3.4.1 Creating Service Requests

Oracle iSupport allows users to create service requests online.

Note: Oracle iSupport features Service Request Profile functionality that can assist your data entry when creating service requests. See Using Service Request Profiles for instructions.

Steps

1. Within Oracle iSupport, navigate to Support > Create Request or select the Create Service Request link in the How Can We Help You? section on your home page.

   The Create Service Request: Problem Summary page appears.

2. Optionally, in the Create Service Requests page, choose a Service Request Profile to associate with the service request. See Using Service Request Profiles for more information.

3. If you select a profile, then the field data that you specified in the profile is validated, and the page fields are populated. If you have not chosen a profile, then in the Contact Information region fill in the following:

   - **Account Number** - Choose the Account Number to associate with the service request. Depending on setup, an account number can be optional.
   - **Contact** - Select a primary contact and optional additional contacts for the service request. Indicate the primary contact by selecting its associated Primary radio button. If you need to update your contacts, select Edit Contacts to display the Edit Contacts page.

     All selected contacts will appear on the service request.

   - **Contact By** - In the Contact By drop-down list for a contact, select the preferred method of contact. These are the contact points set up for your username in the Contact Points page accessible through the Profile button.

4. In the Service Request Details area, enter/select the following:

   Mandatory fields are marked with an asterisk (*).

- **Request Type** - Choose the closest applicable Request Type for the service request. The types shown are limited to those that are mapped to your current responsibility.
- **Preferred Language** - Choose the preferred language.
- **Product Information** - Enter product information if the service request relates to a product. You can either choose from all serviceable products in Inventory or only the products in your Oracle Install Base.
- **Guidelines for Product Searching:**

  To search from all products in Inventory, select Clear to clear the All Supported Products field, and select the associated flashlight icon. A List of Values appears from which you can select the appropriate product.

  To search from all products in Oracle Install Base, select Clear to clear the Products You Own field, and select the associated flashlight icon. A List of Values appears from which you can select the appropriate product.

  For more information on Oracle Install Base, see Using Products.
- **Version** - From the drop-down list, choose the Version Number of the product, if known.
- **Urgency** - From the drop-down list, select the most appropriate Urgency that describes the reason you are submitting the Service Request. If you are requesting information or a phone call, select RFI Only. Urgencies reflect the customer's perceived urgency of the problem.
- **Problem Code** - From the drop-down list, choose the Problem Code, if applicable.
- **Project Number** - In the Project Number field, enter a project number, if applicable.
- **Help Desk Number** - In the Help Desk Number text box, enter a help desk number if appropriate.
- **Incident Address** - The display of this address is configurable. If it is present, enter the incident address, if applicable. Your support organization can add address validation based on needs, such as jurisdiction checking. Therefore, you may see local responses to your entry.
- **Error Message(s)** - In the Error Message(s) field, enter the text of any error messages that you encountered.

- **Service Request External Flex** - With this flex field, your service organization captures additional attributes about a service request, based on their specific requirements.
- **Tasks** - An administrator can choose to display task information related to the service request.
- **Request Summary** - In the Request Summary field, enter a summary of the problem or expected resolution.

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

   To select an attachment: In the Attachments region, select the flashlight icon. In the Add Attachment page, enter the file name (including the exact path and the file extension) and select Attach. To attach a file by locating the file on your computer, select Browse and follow your operating system directions for attaching a file. After the file is attached, you can add text in the Description field.

   To remove an attachment, select its corresponding Remove icon.

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

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

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

   Note: Responding affirmatively to a knowledge base search during service request creation causes the service request submission process to be abandoned.

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

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

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

8. Select Continue. The Create Service Request page refreshes itself and displays template details.
9. Use the LOVs above the Template Details region to filter the information that appears in that region. The LOVs can be for product, urgency, service request type, and type of problem.
10. In the Template Details region, fill in the appropriate information for the fields that the LOV choices produce.
11. Select Continue. The Verify Service Request page appears.
12. In the Verify Service Request page, verify that you have entered the information correctly. If necessary, select Modify Section Above buttons to modify the details that you have entered.
13. Select Submit Service Request to submit the request. If the submission is successful, the Confirmation of Service Request page appears. Make a note of the Service Request Number. You can also print the details.

    Depending on your setup, the application notifies contacts of the creation of the service request and of subsequent changes to it.
14. Optionally, to have the confirmation information sent to you via e-mail, select Email This to Me.

    Note: You must have a valid e-mail address set up in your Contact Points in order to receive service request details via e-mail. (Oracle iSupport utilizes Oracle Workflow Mailer to process e-mails; consult your application administrator for troubleshooting assistance.)
15. Optionally, to add this service request to your service requests quick links tracking bin on the home page, select Add to Quick Links. See Tracking Service Requests on the Home Page for more information.

3.4.2 Using Service Request Profiles

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

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

3.4.2.1 Creating a Service Request Profile

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

Steps

1. Within Oracle iSupport, navigate to Support > Create Request > Add. The Create Service Request Profile page appears.
2. In the Create Service Request Profile page, enter a unique name for the profile in the Service Request Profile text box.
3. If this is your default service request profile, then select the Default Service Request Profile checkbox.

   This profile thus becomes the default in the Create Service Request page, and values from this profile automatically populate the fields in the service request pages.
4. In the Contact Information region, select an Account Number to associate with the profile.
5. Select a primary contact and optional additional contacts for the service request. Indicate the primary contact by selecting its associated Primary radio button.

   All selected contacts will appear on the service request.
6. Select the preferred method of contact (email, phone, fax) in the Contact By drop-down list
7. In the Service Request Details area, select a Request Type for the Service Request. The types available are limited to those that are mapped to your current responsibility.

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

   Guidelines for Product Searching:

   - To search from all products in Inventory, deactivate the Select from products I own checkbox and select the flashlight icon. A List of Values appears from which you can select the appropriate product.
   - To search from all products in your Oracle Install Base, activate the Select from products I own checkbox and select the flashlight icon. A List of Values appears from which you can select the appropriate product.
   - Use the Category field to search by category.
   - For more information on the Oracle Install Base, see Adding Products to Oracle Install Base.

9. From the drop-down list, choose the Version Number of the product, if known.
10. From the drop-down list, select an Urgency that best describes the profile.
11. From the drop-down list, choose a Problem Code, if known.
12. To associate a project number with the profile, enter an appropriate number in the Project Number field.
13. To associate a help desk number with the profile, enter an appropriate number in the Help Desk field.
14. Select Save. The Create Service Requests page reappears, with the profile selected in the drop-down list and the appropriate information filled in the page fields.

3.4.2.2 Editing a Service Request Profile

Follow the steps below to edit a Service Request Profile.

Steps

1. Within Oracle iSupport, navigate to Support > Create Request.
2. In the Create Service Request page, select the desired profile from the drop-down list. Select Edit.
3. Edit the profile information as you wish. See Creating a Service Requests Profile for details about the fields in this page.

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

3.4.2.3 Deleting a Service Request Profile

Follow the steps below to delete a Service Request Profile.

Steps

1. Within Oracle iSupport, navigate to Support > Create Request. The Create Service Request page appears.
2. In the Create Service Request page, select a profile to delete from the drop-down list and select Edit. The details of the profile appear.
3. Select Delete.

3.4.3 Using Service Request Saved Views

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

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

3.4.3.1 Creating a Service Request Saved View

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

Steps

1. Within Oracle iSupport, navigate to Support > View/Update Request. The View Service Requests page appears.
2. Select Create View. The Create Service Request View page appears.
3. Choose values for the following:
   - **View Name** - Enter a name for the view in the View Name field.

- **Rows per Page** - Enter a value for the number of rows to display in the view.
- **Default View** - Select Default View to make this view the default that appears. The default view will be the view that appears on the home page. This is useful if you have more than one view set up.

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

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

Guidelines for Product Searching:

- To search from all products in Inventory, deactivate the Select from products I own checkbox and select the flashlight icon. A List of Values appears from which you can select the appropriate product.

- To search from all products in your Oracle Install Base, activate the Select from products I own checkbox and select the flashlight icon. A List of Values appears from which you can select the appropriate product.
- Use the Category field to search by category.
- For more information on the install base, see Adding Products to Oracle Install Base.

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

3.4.3.2 Editing a Service Request Saved View

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

Steps

1. Within Oracle iSupport, navigate to Support > View/Update Request. The View Service Requests page appears.
2. Select a view to edit from the drop-down list. Select Edit View.
3. Choose values for the following, as appropriate:
   - **View Name** - Change the name of the view in the View Name field.
   - **Rows per Page** - Change the number of rows to appear in the view.
   - **Default View** - Change whether this is the Default View that appears.
4. In the Filters area, you can change the following:
   - **Service Request Number** - Enter a specific Service Request number if you wish the view to display information about a specific request.
   - **Project Number** - Enter a specific Project Number number if you wish the view to display information only from a specific project.

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

  Guidelines for Product Searching:

  To search from all products in Inventory, clear the Select from Products I Own checkbox, and select the flashlight icon. A List of Values appears from which you can select the appropriate product.

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

  Use the Category field to search by category.

  For more information on Oracle Install Base, see Adding Products to Oracle Install Base.

5. In the Display Options area, select the data you wish to display by moving it from the left column to the right column (>). Sort the selected data if desired by using the up and down arrow buttons.
6. In the Sort Options area, you can select three different sort criteria to order the Display Options you selected in the previous step. The top choice, Sorted By, will take precedence over the other two, and the second choice, Then By, will take precedence over the bottom choice. Selecting Ascending will sort the data

by first to last (whether alphabetic or numeric), and Descending will sort the data by last to first.

7. Select Save View. The View Service Requests page appears with the Saved View displayed.

3.4.3.3 Deleting a Service Request Saved View

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

Steps

1. Within Oracle iSupport, navigate to Support > View/Update Request. The View Service Requests page appears.
2. Select a view to delete from the drop-down list.
3. Select Edit View. The Create Service Request View page appears.
4. Select Delete View.

3.4.4 Changing Service Request Status

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

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

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

3.4.4.1 Closing Service Requests

Follow the steps below to close a Service Request.

Steps

1. Within Oracle iSupport, navigate to Support > View/Update Request. The View Service Requests page appears.

2. Select the underlined Service Request Number. The Service Request Detail page appears.
3. From the Status drop-list, select a value that means closed.
4. Select Update to save the changes.
5. Respond to any confirmation message that appears, if appropriate.

3.4.4.2 Re-opening a Closed Service Request

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

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

Steps

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

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

3.4.4.3 Adding Notes to a Service Request

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

Steps

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

3.4.4.4 Escalating Service Requests

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

Steps

1. Within Oracle iSupport, navigate to Support > View/Update Request. The View Service Requests page appears.
2. Select the underlined Service Request Number. The Service Request Detail page appears.
3. In the Service Request Log area, select the Request Escalation button. The Escalate Service Request page appears.
4. Select a new Urgency from the drop-down list.
5. Select a Note Type from the drop-down list.
6. Enter comments in the Justification for Escalation text box.
7. Optionally, add attachments to the service request.
8. Select Confirm.

3.4.5 Searching Service Requests

Oracle iSupport allows you to search for service requests. Use the following procedure.

Steps

1. Within Oracle iSupport, navigate to Support > View/Update Request > Search. The Search Service Requests page appears.
2. Enter values for any or all of the following:
   - **Service Request Number** - Enter a specific service request number if you wish the search results to display information about a specific request.
   - **Project Number** - Enter a specific Project Number number if you wish the search results to display information only from a specific project.
   - **Help Desk Number** - Enter a specific Help Desk Number number if you wish the search results to display information only from a specific help desk number.

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

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

3.5 Using Accounts

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

Topics include:

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

3.5.1 Viewing Orders

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

Steps

1. Within Oracle iSupport, navigate to Accounts > Orders. A list of orders appears on the Track Orders page.
2. Select the Order Number hyperlink to see additional details about a particular order.
3. Optionally, select Details in the Shipments column to view shipment details.

3.5.1.1 Searching Orders

Use the following procedure to search for orders.

Steps

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

3.5.2 Viewing Invoices

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

Steps

1. Within Oracle iSupport, navigate to Accounts > Invoices. A list of invoices appears.
2. Select the Invoice Number hyperlink to see the Invoice Details page.
3. Optionally, select Details in the Shipments column to view shipment details.

3.5.2.1 Searching Invoices

To search for invoices:

Steps

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

3.5.3 Viewing Payments

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

Steps

1. Within Oracle iSupport, navigate to Accounts > Payments. A list of payments appears.
2. Select the Payment Number hyperlink to view the Payment Details page.
3. Optionally, select Details in the Shipments column to view shipment details.

3.5.3.1 Searching Payments

To search for payments:

Steps

1. Within Oracle iSupport, navigate to Accounts > Payments. A list of payments appears.
2. Select the appropriate number from the Account Number drop-down list.
3. In the Search drop-down list, select a search criteria, for example, *payment number*.

4. In the constraint operator drop-down list, select a criteria, for example, *greater than*.
5. In the field, enter search information that corresponds to the search criteria chosen in the drop-down list.
6. Select Go to perform the search.

3.5.4 Viewing Contracts

Follow the procedure below to access your contracts information.**Steps**

1. Within Oracle iSupport, navigate to Accounts > Contracts.

   The Contracts page appears and shows a list of contracts.
2. Select a Contract Number hyperlink to view the Contract Overview page for that contract.
3. Select Back to return to the Contracts page.

3.5.4.1 Searching Contracts

To search for contracts, use the following procedure.

Steps

1. Within Oracle iSupport, navigate to Accounts > Contracts.

   The Contracts page appears and shows a list of contracts.
2. Select Advanced Search.

   The Advanced Search page appears.
3. Use the LOVs, flashlight icon search aids, and other fields to define your search criteria for the desired contracts.
4. Define your desired display and sort options.
5. Select Search.

   The results appear in the Search Results region.

3.6 Using Returns

Oracle iSupport allows you to create return material authorizations (RMAs), or returns. In order for you to create a return for an item, an order first must have been booked in Oracle Order Management. For more information, see:

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

See Creating Returns.

3.6.1 Creating Returns

Follow the procedure below to create a return.

Prerequisite

An order has been booked in Oracle Order Management.

Steps

1. Within Oracle iSupport, navigate to Accounts > Returns > Create Return link. The Create Return page appears.
2. Select an account number and contact for the return.
3. Use the flashlight icon to select an order number in the Order Number field.

   The order line items for this order are displayed.
4. In the To Be Returned Quantity column, enter the quantity to be returned for the appropriate line items.
5. Use the Return Reason LOV to enter the corresponding reason for the return of each item.
6. Enter shipping and billing detail.
7. Select Create Return.

   A confirmation message appears and shows a return order number.

3.7 Using Oracle Install Base

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

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

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

- Tangible products
- Tangible assets
- Software
- Communications and utility services

All Oracle Install Base functionality in Oracle iSupport is contained on the Products tab in the interface for a general user.

Oracle iSupport allows you to view and search Oracle Install Base, as well as add products to it. This topic area includes:

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

3.7.0.1 Viewing Oracle Install Base

Follow the procedure below to view product information in Oracle Install Base.

Steps

1. Within Oracle iSupport, navigate to Accounts > Products.
2. A list of products in Oracle Install Base appears.
3. To view details of a product, select the appropriate hyperlink for the product.

For more information, see the *Oracle Install Base User Guide*.

3.7.0.2 Editing a Product in Oracle Install Base

Here are steps for editing a product in Oracle Install Base.

Steps

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

For more information, please see the *Oracle Install Base User Guide*.

3.7.0.3 Adding Products to Oracle Install Base

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

Use the following procedure to create a product.

Prerequisites

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

Steps

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

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

   Select the calendar icon to help you enter dates.

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

As necessary, select Clear to clear out your test entries, and re-enter your values.

4. If your definition is complete, optionally select Creation Completed.

   Doing so means that it can be used for configuration and other applications.

5. Select Submit.

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

6. Select Submit to save changes.

For more information, please see the *Oracle Install Base User Guide*.

3.7.0.4 Using Saved Searches

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

Steps

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

For more information, see the *Oracle Install Base User Guide*.

3.7.0.5 Defining Saved Search Criteria

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

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

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

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

Steps

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

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

   Select the calendar icon to help you enter dates.

   As necessary, select Clear to clear out your test entries, and re-enter values.
4. In the Table Personalization region, use the Move and Remove commands and arrows to move selected columns between the list of available columns and columns that you select for display.
5. Use the arrows in the right-hand column of the personalization table to arrange the display sequence of your selected columns. The column titles as arranged

from top to bottom are displayed from left to right on the Search My Products page.

6. As appropriate select one of the following:

   Search: Finds values that satisfy the current search criteria

   Enter a name before selecting one of these two options:

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

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

3.8 Using Forums

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

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

3.8.1 Viewing Categories

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

Steps

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

   See Subscribing to Forums for more information on this subject.

3. Categories containing forums show a plus sign (+) in the adjacent column. To expand the category listing and show the available forums, select the plus-sign next to the category name.

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

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

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

3.8.2 Viewing Forums

Follow the steps below to view a forum.

Steps

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

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

   Optionally, select Collapse All to display only the category names.
3. The name of active forums appears as underlined links. Select a link to enter a forum.

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

3.8.3 Posting New Messages to Forums

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

Steps

1. Within Oracle iSupport, navigate to the Support > Forum tab. The Category Listing window appears.
2. In the category list, categories containing forums show a plus sign (+) in the adjacent column. To expand the category listing and show the available forums, select the plus-sign next to the category name.
3. Forums names will appear as hyperlinks. Select a link to enter a forum.

4. Select New Thread.
5. Fill in the Subject name and type your message.
6. Select Post. Your message will be stored underneath the forum.

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

3.8.4 Replying to Forum Messages

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

Steps

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

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

3.8.5 Subscribing to Forums

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

Steps

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

3.8.5.1 Unsubscribing to Forums

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

Steps

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

3.8.6 Setting Forums Signature

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

Steps

1. Within Oracle iSupport, navigate to the Profile button at the top of the page. The Personal Profile page.
2. From the Personal Profile page, select the Support link in the side navigation menu.
3. In the User Signature text box, enter the desired information.
4. Select Update to save changes.

3.8.7 Searching within Forums

Follow the guidelines below to use the forums search function.

Steps

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

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

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

3.8.7.1 Forum Search Results

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

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

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

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

3.9 Requesting a Support Call Back

Oracle iSupport allows users to submit a callback request from Support agents. Use the following procedure to request a Support call back.

Steps

1. Within Oracle iSupport, navigate to Support > Contact Us.

   The Customer Callback Request page appears.
2. Enter the required information in the text fields.
3. Select Submit.

3.10 Responding to Surveys

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

Steps

1. Within Oracle iSupport, select the Feedback icon or link.
2. Select the hyperlink of the appropriate survey.
3. Enter the required information in the text fields.
4. Select Submit when you have completed your responses.

3.11 Changing User Profile Information

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

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

3.11.1 Changing/Resetting Password

Follow the steps below to change or reset a password.

Steps

1. Within Oracle iSupport, select the Profile button at the top of the page. The Personal Profile page appears.

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

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

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

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

Steps

1. Within Oracle iSupport, navigate to the Profile button at the top of the page. The Personal Profile page appears.

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

2. From the Personal Profile page, select the Contact Points hyperlink from the User Profile region of the side navigation menu.

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

To create a new contact point, select Create.

3. Make additions/alterations to the following:

   - **Communication Type** - Enter the type of communication; examples are email, phone, telex.
   - **Address 2** - This is the second line of the address that would appear on an envelope or mailing label.
   - **City** - Enter the appropriate city.
   - **State** - Enter the appropriate state.
   - **Postal Code** - Enter the appropriate postal code.
   - **Country** - From the drop list, select the appropriate country.
   - **Primary Address** checkbox - Select this box if this is the preferred address to use for this user.

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

4. Save the changes by selecting Save.

3.11.3 Setting General Preferences

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

Follow the steps below to change general preferences.

Steps

1. Within Oracle iSupport, navigate to the Profile button at the top of the page. The Personal Profile page appears.
2. Select the Preferences hyperlink. The General Preferences page appears.

   For instructions on how to change current and default responsibilities, see the Changing Default Responsibility topic.

3. In the General Display area, set the following as desired:

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

  RRRR = year

  DD = day

  MM or MON = month

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

3.11.4 Changing Default Responsibility

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

Steps

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

3.11.5 Changing Default Customer Account

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

Steps

1. Within Oracle iSupport, navigate to the Profile button at the top of the page. The Personal Profile page appears.

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

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

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