

# Oracle® Service Intelligence

Implementation Guide

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## 1 Implementing Oracle Service Intelligence

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### 1.1 Overview of Oracle Service Intelligence

Support Center management need to be aware of critical operational issues such as Service Request escalations and resource shortages so they can take corrective actions. They also need to be able to run reports that track Service Request activity by groups, customers and products to analyze performance and trends.

By tracking these statistics and data, Oracle Service Intelligence enables Support Center management to identify issues that need immediate attention and also identify trends that allow for proactive actions that improve efficiency of the Support Center.

### View the Health of Your Support Teams in Real Time

Service Intelligence provides bins that display a selected group's current Service Request backlog categorized by Status Codes, and Service Request Escalations categorized by Escalation Level and Resources available.

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## **Monitor Service Request Backlogs**

Service Intelligence provides reports that allow Support personnel to track Service Request backlogs. Each report presents the information from a different perspective. Available reports are Customer Backlog, Service Request Backlog by Status and Service Request Escalations.

## **Track the Productivity of Support Agents and Groups**

Through the Agent Report, support managers can track the number of service requests that have been taken by support agents for a selected group. Through the Manager report, group information about service requests taken, resolved and backlogged can be tracked.

## **Determine When Service Request Activity is the Highest**

Use the Service Request Arrival Time report to track the spikes in service request activity. In addition, this report identifies if these calls are coming from the web channel or the phone channel.

## **Identify the Products that Generate the Most Service Requests**

The Problem Avoidance report shows the top products and components that generate service requests. This gives Support management an advantage in identifying which products and components to target for proactive problem avoidance activities.

## **1.2 Dependencies for Service Intelligence**

### **Definition of Required Dependencies**

Service Intelligence dependencies affect the product's implementation and ongoing operations; hence, you must install and set up all Service Intelligence dependent components. To implement Service Intelligence, you must activate its required dependencies from different libraries, modules, engines, and applications.

### **List of Service Intelligence Dependencies**

FND - FND forms are used to setup form functions, concurrent programs, menus, and responsibilities.

AK - AK forms are used to enter parameters, graph titles, and report column headings.

JTA/JTT – CRM Foundation like resource, task, DCF (Declarative Framework).

Oracle Customer Support – Service Intelligence uses Customer Support to report on.

## 1.3 Implementation Steps

This section describes the required steps you have to complete to set up Service Intelligence.

**Table 1 Implementation Steps**

Step No.	Required?	Description
1	Yes	Confirm: Setup Oracle Support See: Oracle Support Implementation Guide
2	Yes	Create a User with Service Intelligence Responsibility See: Oracle Applications System Administrator's Guide
3	Yes	Setup Service Intelligence Profile Options See: Implementing Oracle Service Intelligence
4	Yes	Run Concurrent Programs See: Implementing Oracle Service Intelligence

### 1.3.1 Step 1: Confirm: Setup Oracle Support

To implement Oracle Service Intelligence, confirm that Oracle Support is fully setup and functional.

For more information, please see Oracle Support Implementation Guide - Document ID A95148-01 on Metalink.

### 1.3.2 Step 2 - Create a User with Service Intelligence User Responsibility

To have complete access to Service Intelligence functionality, you must log in with a username that has the **Service Intelligence User** responsibility associated with it.

For details on creating users and associating responsibilities, please see *Oracle Applications System Administrator's Guide*.

### 1.3.3 Step 3 - Set Up Service Intelligence Profile Options

Service Intelligence provides flexibility in the information it displays by using system profile options.

**1.3.3.1 Define the Severity Levels** Service Intelligence has reports that provide information on service requests with the focus on the service requests' severity levels. Because severity levels are defined at the time that Oracle Support is implemented, Service Intelligence requires that the implementation administrator define which severity levels are most appropriate to view in these reports.

Following is a list of profile options related to severity levels.

- BIV:INC\_SEVERITY\_1
- BIV:INC\_SEVERITY\_2
- BIV:INC\_SEVERITY\_3
- BIV:INC\_SEVERITY\_4
- BIV:INC\_SEVERITY\_5

It is recommended that the most critical severity be used to define BIV:INC\_SEVERITY\_1, the second most critical severity used to define BIV:INC\_SEVERITY\_2 and so on.

**1.3.3.2 Define the Status Codes** Service Intelligence has reports that provide information on service requests with the focus on the service requests' status codes. Because status codes are defined at the time that Oracle Support is implemented, Service Intelligence requires that the implementation administrator define which status codes are most appropriate to view in these reports.

Following is a list of profile options related to status codes.

- BIV:INC\_STATUS\_1
- BIV:INC\_STATUS\_2
- BIV:INC\_STATUS\_3

It is recommended that the three most critical status codes be used to define the above parameters.

For details on setting Profile Options, please refer to the *Oracle Application's System Administrator's Guide*.

## 1.4 Run Concurrent Programs

To update the Summary Tables used by Service Intelligence, the following concurrent programs need to be run while logged in as a user with **Service Intelligence Collection Manager** responsibility.

### **1.4.1 Collect Service Request Data**

This concurrent program should be run everyday. It is used to insert and update data into the Service Request Summary Tables.

### **1.4.2 Collect Group Levels**

This concurrent program should be run periodically depending on how often Assignment Group and Organization Group data is being changed in Resource Manager

For details on running concurrent programs, please refer to the *Oracle Application's System Administrator's Guide*.

## **1.5 Additional Document**

The following document provides additional information to assist you during the implementation process:

- Implementing Oracle CRM: Foundation Functional Checklist Release 11i - Document ID 117183.1 on Metalink.

