Oracle® Service Intelligence

Concepts and Procedures

Release 11*i*

January, 2002

Part No. A95403-02

1 Overview of Oracle Service Intelligence

1.1 What is Service Intelligence?

Service Intelligence is a web-enabled tool that allows Support management to access reports that provide information on critical operational events, such as Service Request escalations, resource shortages, and critical customer activities. Tools are integrated with Service Intelligence to allow Support management to take corrective actions when necessary.

In addition to reports for critical real time events, Service Intelligence provides the launching point for historical reports that allow Support managers to look at key performance measures. With this data, users can make efficient and strategic business decisions regarding their service and support organizational needs and activities.

Service Intelligence includes the following features:

1.1.1 Customizable Home Page

The Service Intelligence home page allows personalization by allowing users to define which bins to display and in what order. It also allows users to define a report(s) that will be displayed every time they logs in.

1.1.2 Bins

Bins are configurable reporting objects on the left side of the application Home Page. Bins display between two and four columns of data with links to corresponding "drill down" reports in the Home Page Report Area. Each Home Page Bin has its own "Edit" dialog for configuring the Bin contents.

1.1.3 Reports

Reports are tabular displays of data pulled from transactional or summary tables. Using parameters, reports can be filtered to narrow the display of data to information that is of most interest.

Note: Every report in Service Intelligence offers drill-downs to enable the user to see additional details. Look for values that are "hyper-linked"in reports. These hper-linked values are underlined, and have drill-downs that are displayed when you click on them.

---

2 Service Intelligence Home Page

2.1 Overview

This section describes how to personalize the Service Intelligence Home Page. Topics covered are as follows:

- Home Page Layout
- Basic Navigation
- Basic Navigation
- Selecting Bins to Display and Their Display Order
- Setting Up Bin Filters
- Selecting a Default Report for the Home Page

2.1.1 Home Page Layout

The Service Intelligence Home Page has three distinct sections:

1. The Bins section displays all the bins selected.

2. The Default report and Bin drilldown display section initially displays the default reports and then displays drill downs selected from the bins.

3. The Navigation section includes the tabs and sub tabs for Service Intelligence.

2.1.2 Basic Navigation

To access the main window of Service Intelligence, do the following.

1. Using an Oracle Applications-supported Internet web browser, go to the Service Intelligence URL. This brings you to the Applications login page.

2. Enter your username and password. The username should have the Service Intelligence user responsibility.

The Service Intelligence application will be displayed.

2.1.3 Tabs in Service Intelligence

Service Intelligence has two tabs. The first tab is the Home tab, which allows the user to go back to the Service Intelligence home page. The second tab is the Reports tab. This tab allows the user to navigate to the area that contains all of the canned reports for Service Intelligence. In the Reports tab, there are two sub-tabs, Real Time and Historical. Real Time canned reports can be viewed by opening the Real Time sub-tab. Similarly, Historical canned reports can be viewed by opening the Historical sub-tab.

2.2 Bin Description

Service Intelligence provides the following three bins:

2.2.1 Service Request Bin

The Service Request bin displays all unresolved Service Requests for a selected group, categorized into the different status codes.

2.2.2 Service Request Escalations Bin

The Service Request Escalations bin displays all the unresolved Service Request Escalations for a selected group, categorized into the different escalation levels.

2.2.3 Resources Bin

The Resources bin displays all the resources available for a selected group.

## 2.3 Selecting Bins to Display and Their Display Order

Because different users play different roles in support organizations, and because users are interested in a range of information, Service Intelligence allows the user to tailor what Bins are displayed on the home page.

To specify which Bins are to be displayed, do the following:

1. Click the Personalize link located on the right side of the Service Intelligence Home page. This opens the Personalize Your Homepage screen.

2. On the left side of this screen, the Available Bins/Displayed Bins shuttle control area is displayed.
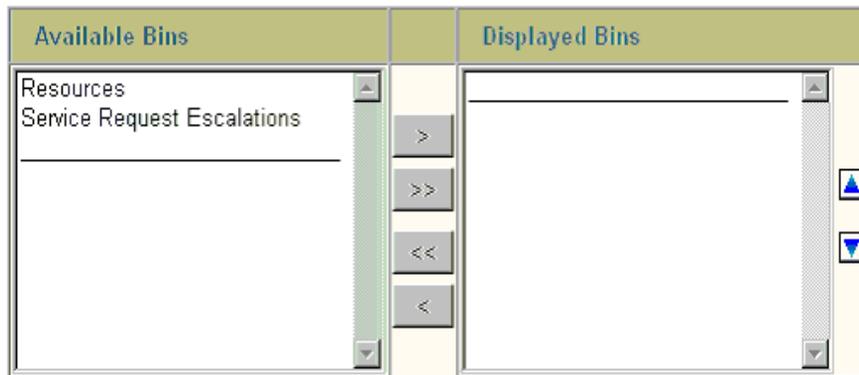
3. In the Available Bins area, select the bins you want displayed by clicking on them. Click the ">" arrows to move the selected bins to the Displayed Bins area.
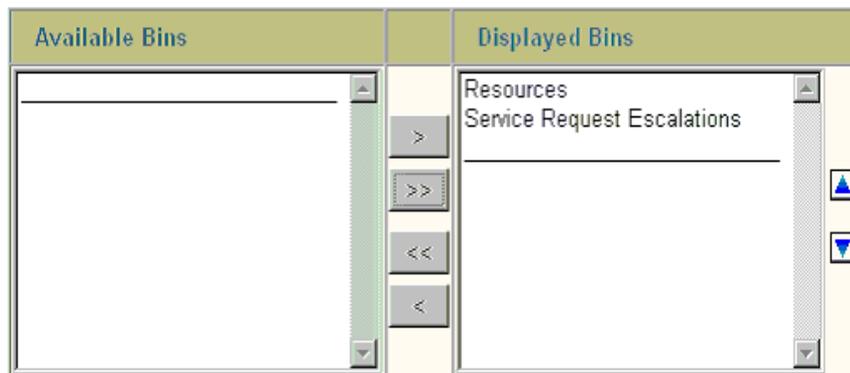
The order in which the bins are listed in the Displayed Bins area is the same order that the bins will be displayed in the Home page. You can use the "up and down pointers," located on the right side of the Displayed Bins area, to rearrange the display order of the bins.

4. Click **Update**.

This takes you back to the Home page with the appropriate bins displayed in the appropriate order.

2.4 Setting Up Bin Filters

To tailor the data displayed in each bin, Service Intelligence allows users to specify parameters that focus the data being displayed in the bin.

To set up the Bin filters, do the following:

1. Click **Edit** for the bin that you want to change parameters.

A parameter page specific to that bin is displayed.

Service Requests	Edit
Status	Count
Open	3588
Resolution In Process	4
Assignment/Dispatch Complete	2
Engineer On-Site	1
Cancelled by User	1

2. Enter the desired values for each of the parameters.

3. Click **Update**.

This brings you back to the Home page. The bin now displays the filtered data.

2.5 Selecting a Default Report for the Home Page

Service Intelligence allows users to define a report as the default report. This means that every time that user logs in, the default report is run and displayed in the Home page.

To specify which Bins are to be displayed, do the following:

1. Click the Personalize link located on the right side of the Service Intelligence home page. This opens the Personalize Your Home Page screen.

2. On the right side of this screen, the Available Modules/Displayed Modules shuttle control area is displayed.

3. In the Available Modules area, select the reports you want displayed by clicking on them.

4. Click the ">" arrow to move the bins to the Displayed Modules area.

    Note: The order in which the reports are listed in the Displayed Modules area is the same order in which the reports will be displayed in the home page. You can use the "up and down arrows," located on

the right side of the Displayed Modules area, to rearrange the display order of the reports.

5. Click **Update** to return to the home page with the appropriate default report(s) displayed in the appropriate order.

3 Service Intelligence Reports

3.1 Overview of Service Intelligence Report

This section describes the following.

- Service Intelligence Real Time and Historical Reports

- How to Run Reports

3.1.1 Service Intelligence Real Time Reports

Service Intelligence provides several Real Time canned reports. When run, these reports include the latest information available. The available Real Time reports are:

3.1.1.1 Agent Report The Agent report describes how many Service Requests a selected group's agents took on a given day, closed on that day, and how many Service Requests are in backlog.

3.1.1.2 Manager Report The Manager report gives a high level view of Service Requests that have been received in a day. It describes how many of those requests were resolved and how many are in backlog

3.1.1.3 Monitor Report The Monitor report describes how many Service Requests generated from each channel that are in backlog. This report allows a business to focus on a particular set of Service Requests if they wish to over-service Service Requests generated from a particular channel.

3.1.1.4 Customer Backlog Report The Customer Backlog report describes how many Service Requests customers have in the following categories.

- Total requests

- Escalated requests

- Unowned requests

- Requests in the highest severity level

3.1.1.5 Escalated Service Requests The Escalated Service Requests report describes the number of Service Requests a customer has, in both an open status, and in an escalated state.

3.1.1.6 Service Request Backlog by Status The Service Request Backlog by Status report describes the total backlog for selected groups, categorized into the different status codes.

3.1.1.7 Service Request Backlog Aging The Service Request Backlog Aging report describes the number of open and escalted Service Requests a customer has.

3.1.1.8 Service Request Task Activity The Service Request Task Activity report describes any of the selected group's open Service Requests containing unresolved tasks. It also provides a view of unresolved tasks owned by the group.

3.1.2 Historical Canned Reports

Service Intelligence also provides several historical canned reports. When run, these reports include the information up to the most recent time that the Service Intelligence summary tables were updated (typically, within the previous 24 hours). The historical reports provided are:

3.1.2.1 Service Request Activity The Service Request Activity report describes the number of Service Requests received from the web channel, created from the phone channel, closed and put into backlog for a given time frame.

3.1.2.2 Service Request Arrival Time The Service Request Arrival Time report describes the number of new Service Requests received from telephone- and web-based channels during each half-hour of a day.

3.1.2.3 Problem Avoidance The Problem Avoidance report describes which components/subcomponents generate the most Service Requests for a given time period.

3.1.2.4 Service Request Escalations The Service Request Escalations report identifies the products, the groups, and the customers that have the most Service Request escalations.

3.1.3 Running Reports

3.1.3.1 Running Real Time Reports To run Real Time Reports, do the following:

1. To gain access to the Real Time Reports, open the Reports tab.

The Reports tab contains two sub-tabs, Real Time and Historical. Opening the Reports tab also opens the Real Time sub-tab. In this page, a list of all the available Real Time Reports is displayed.

2. To run a report, click on the report name of the report you want to run.

A parameter page opens. This parameter page allows you to specify which information appears on the report. Enter the values with which you want to filter, and continue with the report.

3.1.3.2 Running Historical Reports
To run Historical Reports, do the following:

1. To gain access to the Historical Reports, open the Reports tab.

The Reports tab contains two sub-tabs, Real Time and Historical.

2. Open the Historical tab to view the list of historical reports.

3. To run a report, click on the report name of the report you want to run.

A parameter page opens, which allows you to specify which information appears on the report.

4. Enter the values with which you want to filter, and continue with the report.