Oracle® Citizen Interaction Center

Implementation Guide

Release 11*i*

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Oracle Citizen Interaction Center Implementation Guide, Release 11*i*.

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

Preface

Audience for This Guide

Welcome to Release 11*i* of the Oracle Citizen Interaction Center Implementation Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.

- Oracle Citizen Interaction Center

  If you have never used Oracle Citizen Interaction Center, Oracle suggests you attend one or more of the Oracle Citizen Interaction Center 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*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and implement Oracle Citizen Interaction Center.

The Oracle Citizen Interaction Center Implementation Guide contains seven chapters and two appendixes:

Chapter 1, "Overview of Oracle Citizen Interaction Center"

This section provides an overview of Oracle Citizen Interaction Center (CIC) and its components. It explains the key concepts, features, and functions of Oracle CIC.

Chapter 2, "Implementation Overview"

This chapter presents an overview of the implementation steps that you need to perform to set up Oracle Sales for Communications.

Chapter 3, "Implementing Oracle CIC Foundation"

This chapter provides detailed implementation steps and instructions on how to setup notes, resources, roles, territories and calendars. It also discusses the setting up of escalation management.

Chapter 4, "Implementing Citizen Management"

This chapter provides detailed implementation steps and instructions on how to implement the Contact Center.

Chapter 5, "Setting Up Tasks and Service Request"

This chapter provides detailed implementation steps and instructions on setting up task and service request types for Oracle Citizen Interaction Center.

Chapter 6, "Implementing CIC Self-Service"

This chapter provides detailed implementation steps and instructions on how to implement the Oracle Citizen Interaction Center Self-service. This chapter discusses the setting up of Knowledge Management, the Marketing Encyclopedia, and the Homepage.

Chapter 7, "Setting Up Profiles"

This chapter provides detailed information on the profile options that you must set up to implement Oracle Citizen Interaction Center.

Appendix A, "Oracle CIC Public APIs"

This appendix presents information on the public APIs in Oracle Citizen Interaction Center

This appendix presents the navigation paths you may follow to open the setup windows indicated in this Implementation Guide

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 Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Citizen Interaction Center.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Citizen Interaction Center shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other

product documentation when you set up and use Oracle Citizen Interaction Center.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Documents Related to All Products

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 Citizen Interaction Center (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.

Documents Related to This Product

Oracle Customer Interaction Center Concepts and Procedures This guide presents step-by-step procedures to help you use all the features supported by Oracle Citizen Interaction Center.

Oracle CRM Foundation Concepts and Procedures This guide presents information on using the foundation modules for Oracle CRM Applications.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

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 Citizen Interaction Center. This manual details additional steps and setup considerations for implementing Oracle Citizen Interaction Center with this feature.

Multiple Organizations in Oracle Applications

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

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 Citizen Interaction Center 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 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 11i.

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 Citizen Interaction Center 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 Citizen Interaction Center working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLin*k, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

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

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

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

About Oracle

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

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

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

1

Overview of Oracle Citizen Interaction Center

This section provides an overview of Oracle Citizen Interaction Center (CIC) and its components. It explains the key concepts, features, and functions of Oracle CIC. This chapter covers the following topics:

- What is Oracle CIC?

- Why Use Oracle CIC?

- Major Features

- Key Business Processes

- Key Business Scenarios

1.1 What is Oracle CIC?

In today's technology driven world, it is essential for government agencies to provide citizens with multiple channels of interaction. Citizens demand the ability to easily contact the Citizen Service Representative (CSR) using their preferred channel of communication.

Oracle CIC is a comprehensive and flexible solution that manages citizen's data and request for information and services. It also manages the fulfillment process for these requests, irrespective of the channel through which the citizen initiates the contact with the federal, state and local government and its departments (collectively referred to as government agencies from this point onwards). Oracle CIC streamlines citizen interaction with government agencies. It helps government agencies in analyzing citizen contact points, concerns and government responses.

Oracle CIC helps government agencies understand citizens' needs, and then use this knowledge to provide a level of service that exceeds their expectations. It provides a means for better understanding and interacting with citizens using readily available relationship, service, tasks, and interaction history information.

Oracle CIC uses a workflow for managing service requests from creation to resolution. It provides the following functionalities:

- Citizen Management

- Service Request Management

- Resolution Management

1.2 Why Use CIC?

Government agencies are, generally, in a race against time to keep up with citizen's demand for information and services. For example, in many cases, 911 lines are over-burdened with non emergency calls placing individuals with critical emergency situations at risk. Government agencies are faced with the challenge of providing agency-specific information, and accepting and managing the entire life-cycle of the requests for information and services originating from its citizens. This includes:

- Providing cross-agency information over the web and through the call center

- Accepting requests

- Recording details of the requesting citizen

- Monitoring the priority of the request

- Identifying potential duplicates

- Processing the request

- Managing the fulfillment of the request.

Oracle CIC is the ideal tool for government agencies concerned about improving service to its citizens. Oracle CIC's flexible design accommodates rapid growth, shifting citizen demands and the rising expectations for improved public service, at the same time manage service costs. As a part of Oracle's eBusiness suite of applications, it streamlines citizen interaction and support, while enabling government agencies to analyze citizen contact points, citizen concerns and government responses to those concerns.

1.3 Major Features

Oracle CIC enables government agencies with limited funds to meet the expectations of the public and draw maximum benefit from these funds by improving service delivery and streamlining processes. Oracle CIC enables government agencies to provide a single point of contact for cross-departmental inquiries and service requests. The product enables:

- Governments to meet the demand for information and services
- Citizens to easily access government services.
- 911 systems to focus on emergencies.

The Major features of Oracle CIC include:

- Citizen Management
- Service Request Management
- Resolution Management

Oracle CIC establishes a full-fledged call center environment,. The call center provides a database that the citizens can query to obtain answers to their day-to-day issues. If the information is not available, or is not appropriate, citizens can contact the call center where they can log service requests irrespective of the government agency dealing with these issues.

The primary focus of the Citizen Support Representatives in the call center is to understand the citizen's issue and resolve it on the first call, if possible, thereby avoiding escalations and/or call transfers. This allows agency experts to focus on their areas of expertise without the constant distraction of explaining well documented issues and solutions.

Oracle CIC provides government agencies with the right tools and knowledge for responding effectively and proactively to the issues raised by citizens. Key features of Citizen Management include:

Profile   The profile tab provides the CSR instant access to information on the citizen and enables him/her to effectively address the needs of the citizen.

Relationship Management   Oracle CIC allows the CSRs to capture citizens' relationships with others in the community (including relations with government agencies and other organizations) to enable CSRs to engage knowledgeably with the citizen, community and other government agencies.

Citizen Data Store   Oracle CIC allows government agencies to maintain a comprehensive database of all citizen interactions with the agency. Oracle CIC maintains detailed interaction history to trace the origin of an issue and the follow up action(s) taken to solve it.

Citizen Home Page   By default, Oracle CIC provides a home page containing news from the appropriate government agencies, links, and a mechanism for checking the status of service requests. Each citizen can personalize this home page so that it displays information based on the citizen's preferences.

1.3.1 Service Request Management

Oracle CIC empowers government agencies to offer citizens the convenience of accessing service through multiple interaction channels including over the counter, telephone and Web self-service. Key service management processes include:

- Entering Service Requests

- Entering Incident Location

- Handling Duplicate Service Requests

- Searching the Knowledge Management Database

- Web Access

Service Request Builder   Oracle CIC provides an intuitive interface, which the CSRs can use to enter new service requests and data to be gathered. It allows CSRs to record citizen information and attempt problem resolution to solve citizen issues in the very first interaction itself.

Validation of Incident Location   Oracle CIC allows for the integration of third party spatial products to verify the location of an incident. Third party Geographical Information Systems (GIS) can be integrated with Oracle CIC to validate the incident location based on an exact match or the nearest intersection.

Handling of Duplicate Service Requests   Oracle CIC identifies duplicate service requests when a potential duplicate service request is entered into the system. The responsible party is notified to analyze the service request to determine if it is indeed a duplicate.

Searchable Knowledge Management Database Oracle CIC makes available a database of solutions, which the CSRs can search with a view to solving the problem while the citizen interaction is in progress. It can also be used to provide information such as blue pages, government guides, policies, procedures and FAQs.

Web Access Oracle CIC allows citizens easy access to the status of their service request(s).

1.3.2 Resolution Management

Oracle CIC improves operational efficiency by rapidly processing service requests using predefined activities. Key resolution management features include:

- Automatic task creation based on service request type and information provided by the citizen.

- Automatic routing of service request for immediate processing.

- Email notification to concerned external agencies.

- Escalation of service requests where no resolution has been forthcoming within a predefined period of time.

- Field Service scheduling, dispatching, viewing and monitoring.

1.4 Key Business Processes

1.4.1 The Citizen Service Representative

Typically, a CSR accepts direct calls from citizens on multiple issues. The CSR relies on intuitive systems and ready access to citizen information to perform the job effectively.

The primary focus of the CSR is to understand the citizen's issue and resolve it on the first call, if possible, thereby avoiding escalations and/or call transfers. Often, the CSR must resolve the issue in an allotted time span.

The Contact Center is a one stop shop for all citizen interactions and transactions. It empowers the CSR with extensive knowledge about the citizen so as to cater to the citizen's needs effectively.

1.4.2 Citizen Information Management

The Contact Center is the central place for managing all citizen information. The CSR can view detailed information about the organization, contact, addresses and relationships for the citizen and update the information as required. The CSR can:

- Search the database to quickly identify the citizen.

- Add/update citizen data in the system.

- View the history of all interactions with the citizen.

- Drill down to the document attached to an interaction activity for more details.

Citizen management involves tracking important citizen data, and making it easily accessible to the CSR.

1.4.3 Citizen Interaction Management

There are several ways in which a citizen can initiate an interaction with a government agency: phone calls, the web, and a face-to-face interaction with a representative at the counter. In a typical call center setting, the CSR can view and select the work items assigned to him/her from the Universal Work Queue (UWQ).

The Contact Center provides a single interface for managing all citizen transactions. The CSR can log a quick service request, search the knowledge base for solutions, and/or information, assign tasks, enter and view notes for the citizen, and view the citizen's interaction history.

The intuitive user interface of the Contact Center is designed to enable a CSR to handle citizen interaction as effortlessly as possible in the minimum amount of time necessary to achieve the desired result.

1.4.4 Profile

The Profile tab displays summarized information about the citizen that is appropriate for the CSR to know. It may contain key indicators such as critical citizen status and various other attributes. These indicators, or profile checks, may be flagged by appropriate ratings and colors which give instant visual clues to the CSRs and enable them to engage appropriately with the citizen. The CSRs have the ability to drill down from a key indicator to the detail list and eventually to the original transaction to make a more comprehensive assessment of the citizen's situation. Citizen Profile is completely configurable; you can tailor it to suit your specific service needs.

Oracle CIC offers a set of predefined profile checks belonging to the following types:

- Critical Citizen Y/N

- Number of Outstanding Service Requests

- Number of Escalated Tasks

The Profile tab provides a panoramic view of citizen's transactions.The profile enables the CSR to drill down to view the service request. The profiles can be configured to display any number of key indicators and organized into categories for a more meaningful display.

1.4.5 Critical Citizen Management

Oracle Citizen Interaction Center allows government agencies to define rules governing the criticality of their citizen base. A threshold level can be defined for different profile checks, which when crossed would flag the citizen as critical. The CSR can then initiate proper action to resolve the situation or escalate the resolution process. For example, a rule could be created to define a citizen as a critical citizen if more than 5 open service requests are pending for the citizen.

The Critical Citizen Management feature of Oracle CIC enables CSRs to manually override the criticality of the citizen. For example, there may be situations when the profile engine may not determine a citizen as being critical based on the rules setup, but the citizen still needs to be flagged as critical in order for citizen data to be displayed in all the relevant Oracle CIC windows.

1.4.6 Relationship Plans

The Relationship Plans module is designed to enable government agencies to automate their citizen service practices and to provide proactive and consistent care for all the citizens. It provides government agencies with a complete tool to revamp their service and provide closed loop support.

Government agencies can create and execute different plans for different citizen groups. Relationship plans can be configured to uniquely target each citizen and ensure an appropriate citizen profile. Execution of these plans would improve real-time responses to citizen concerns. Examples of Relationship Plans are:

- Critical Citizen Plan

- Preventive Maintenance Plans

- Citizen Interactions

1.4.7 Dispatch of Resources

Oracle CIC provides an intuitive interface that supports an automated process to manage field service operations. This interface assists in assigning tasks to resources, creating and distributing daily dispatch schedules and monitoring progress.

1.5 Key Business Scenarios

The following discussion explains the business scenarios the Oracle CIC supports.

1.5.1 Web Interaction

Citizen contacts the government agency by logging on to its web site and opening the home page. From the home page, the citizen can search the Knowledge Management database for a solution to his/her issue. The Knowledge Base may store specific departmental URLs or department-specific documentation to answer questions. If a solution is found in the Knowledge Base, the citizen logs off. If an appropriate solution is not found in the Knowledge Base, the citizen contacts the Call Center.

1.5.2 Face-to-face Interaction

The citizen walks into the agency to get information or to have an agent create a service request. At the agency, a resource will listen to the request and attempt to guide the citizen in solving the issue. If the issue is not resolved, the agent will create a service request.

1.5.3 At the Call Center

On contacting the call center, a CSR interfaces with the citizen. The CSR listens to the citizen's problem and searches the Knowledge Base for solutions that would solve it. If a satisfactory solution is found in the Knowledge Base, the interaction is terminated.

If a solution is not available from the Knowledge Base, the CSR creates a service request. A background workflow will then automatically create the tasks based on preconfigured criteria. Generally, the CSR would give the service request number to the citizen for future reference. The citizen can use this number to track the progress of the service request as it moves through the resolution process by calling the call center or checking the status over the web (CIC Self-Service).

The Dispatch Center assigns an appropriate government agency resource to go to the incident site (for example, to pick up an abandoned vehicle), if so required. If dispatch of resource is not required, the supervisor or the responsible party will assign the task to an appropriate resource for resolution. Resources will complete the assigned tasks and update the service request status. The CSR closes the service request when the issues is resolved.

2

Implementation Overview

This chapter presents an overview of the implementation steps that you need to perform to set up Oracle Citizen Interaction Center. This chapter covers the following topics:

- Considerations for Planning an Implementation Project

- Key Implementation Decisions

- Implementation Starting Point

- Integration with Other Applications

- Overview of Implementation Steps

- Defining an Oracle Applications User

2.1 Considerations for Planning an Implementation Project

Proper planning is essential for the success of any implementation project. Planning, coupled with the use of a structured methodology, such as Oracle Application Implementation Methodology (AIM) would ensure the smooth progress of your implementation project. The following section presents some of the key implementation considerations.

2.2 Key Implementation Decisions

2.2.1 Loading Citizen Data

Oracle CIC allows you to capture citizen data in real-time. However, there may be situations when citizen data is already available from other systems. In such cases, you may want to import available citizen information along with relationship data.

For example, the Public Works Department already has extensive data on all the citizens in its service area. In this scenario, it may serve the agency better if all such data is imported into the system.

You will also have to decide if you want to allow the logging of anonymous service requests (for service requests where the citizen does not wish to be identified). If you decide to allow anonymous service requests, you will need to create a default citizen (with a first and last name of your choice, for example, Anonymous XXXXX where XXXXX is the ZIP code, the name of the county, city, etc.).

2.2.2 Resource Creation

Determine the resources that have to be created in the system. All CSRs, field personnel, and other employees who will be using Oracle CIC must be created as resources.

2.2.3 Territory Creation

Define the territories that your agency would service. You must also allocate resources to these territories so as to establish the link between your resources and the territories.

2.2.4 Knowledge Base Management

Determine the information that will go into the Knowledge Base. It is recommended that you identify and list the information sources (for example, the blue pages, government guides, policies, procedures and FAQs) at the outset.

2.2.5 Service Request Builder Setup

Define the service request types and the attributes associated with each of them. Also identify the owner for each service request type. You would also need to define the criteria based on which duplicate service requests will be identified.

2.2.6 Task Creation

Determine the task(s) that will be, by default, assigned to each service request type. This association may also depend on the responses received for each service request attribute. Oracle CIC provides email notification and dispatch the seeded task types that you can associate with each service request type. The email notification task type enables you to send emails to external agencies and the dispatch task type makes available the task for scheduling within Oracle Field Service.

2.2.7 Calendar Definition

Determine the shifts, patterns and time periods when resources are available to work.

2.3 Implementation Starting Point

Before starting the implementation, identify all your implementation team members and the access privileges they require. Oracle CIC provides Oracle CIC Administrator as the seeded implementation responsibility. In addition to this, implementation team members may have to use other responsibilities. You may have to create additional implementation responsibilities if you want to restrict access.

You can create Oracle Applications users with appropriate responsibilities for performing implementation procedures. The user name you assign to the user can be used to log on to Oracle CIC. You must use the System Administrator responsibility to create the user.

2.4 Integration with Other Applications

Oracle CIC supports the business processes involved in solving citizen's issues related to the services provided by government agencies. Oracle CIC is a self-contained solution for government agencies interacting with citizens on a day-to-day basis.

Oracle CIC allows for integration with external applications such as Geographic Information Systems to provide incident address validation. Integration with such spatial systems are achieved through Validate Incident Address, which is a public API.

2.5 Overview of Implementation Steps

The following table indicates the steps you have to complete to set up Oracle CIC.

Step No.	Description
1.	Set up Notes
	■ Set up Notes Type
	■ Map Note Types to a Source Application

Step No.	Description
2.	Set up Resource Manager
	■ Define Role Types
	■ Define Roles
	■ Create Employee Resources
	■ Import Resources
	■ Creating Resource Groups
	■ Create Resource Teams
3.	Set up Territories
	■ Create Custom Qualifiers
	■ Select Qualifiers
	■ Set up Territory Types
	■ Define Territories
	■ Assign Territories to Planner Groups
	■ Define Escalation Territories
	■ Generate Territory Packages
4.	Set up Calendars
	■ Define Calendar Types
	■ Define Availability Types
	■ Define Exception Categories
	■ Define Exception Reasons
	■ Define Calendars
	■ Define Shifts
	■ Define Exceptions
	■ Assign Shifts/Exceptions
	■ Assign Calendar Resources
5.	Set up Escalation Management
	■ Set up Escalation Lookup Codes
	■ Start the Escalation Manager Workflow Process
	■ Define Escalation Statuses
	■ Define Escalation Reference Types
	■ Define Escalation Reason Codes (Optional)

Step No.	Description
6.	Set up Citizen Profile
	■ Define Contact Center Specific Lookup Codes
	■ Set up Message Action Requests
	■ Define Citizen Profiles
	■ Define Profile Rating Lookup Codes
	■ Define Profile Variables
	■ Define Drilldowns
	■ Define Profile Checks
	■ Define Profile Groups
	■ Define Dashboard Groups
	■ Set Preferences
	■ Run the Customer Profile Engine
7.	Set up Relationship Plans
	Define Plan Groups
	Define an Action
	Define Process Definitions for Outcomes
	Define Messages
	Define Relationship Plans
	Add/Modify Relationship Plan Condition Lines
	Enable Relationship Plans
	Run the Relationship Plan Assignment Engine
8.	Set up Tasks
	■ Define Task Types
	■ Define Task Status
	■ Define Priority
	■ Define Task Type Attributes

Step No.	Description
9.	Create Lookup Codes for Service Request Type Attributes
	■ Set up Service Request Statuses
	■ Set up Service Request Types
	■ Set up Service Request Severities
	■ Set up Service Request Urgencies
	■ Set up Service Request Problem Codes
	■ Set up Service Request Resolution Codes
10.	Set up Service Request Type Attributes
11.	Configure Service Request Task Attributes
12.	Define Tasks and Service Request Attribute Values
13.	Set up Incident Address Flexfield
14.	Set up Workflows
15.	Creating Users
	■ Register a User
	■ Approve Users
	■ Assign User Roles
	■ Assign Responsibilities
	■ Check System Profiles
16.	Set up Knowledge Management
	■ Set up Note Types for Knowledge Base Use
	■ Set up Statement Types
	■ Set up Solution Types
	■ Associate Statement Types to Solution Types
	■ Map Note Types to Statement Types
	■ Create Statements (HTML)
	■ Relate a Statement to a Solution
	■ Set up Solution Sets
	■ Define Frequently Used Solutions
	■ Set up Recommended Solutions
	■ Run the Knowledge Management Concurrent Programs

Step No.	Description
17.	Set up the Marketing Encyclopedia System
	■ Set up Channel
	■ Publish Contents on Oracle CIC Self-Service Homepage
18.	Set up Forums
	■ Define Forums
	■ Create Forum
	■ Restrict Forum Access Type
	■ Run the Usergroup Creation Concurrent Program
	■ Associate Usergroup to Restricted Forum
	■ Verify/Test Restricted Forum
	■ Change Forum Access Type
	■ Set up Forums Search Function
	■ Maintain Categories, Forums, and Messages
	■ Disable Menu Option
19.	Set up Citizen Homepage
	■ Alter Content and Layout
	■ Set up Subscriptions
	■ Set up Email Interval
	■ Run Subscriptions Concurrent Program
20.	Set Up Profile Options
21.	Perform Post Installation Tasks
	■ Setup Workflows

2.6 Defining an Oracle Application User

Oracle CIC provides Oracle CIC Administration as the seeded implementation responsibility. In addition to this, implementation team members may have to use other responsibilities.

You can create Oracle Applications users with appropriate responsibilities for performing different implementation procedures. The user name can be used to log on to Oracle CIC.

You must use the System Administrator responsibility to create the required Oracle Applications user(s). Implementation team members would need access to one or more of the following responsibilities:

- System Administrator

- Oracle CIC Administrator

- Foundation Administrator

- *i*Support Administrator

- Knowledge Management Administrator

Use the Users window to define Oracle Applications users. Oracle Application user will need to be uniquely identified by an application user name. For detailed information on creating application users, please refer to the *Oracle Applications System Administrator's Guide.*

3

Implementing Oracle CIC Foundation

This chapter provides detailed implementation steps and instructions on how to setup notes, resources, roles, territories and calendars. It also discusses the setting up of escalation management. This chapter comprises the following topics:

- Setting up Notes

- Setting up Resource Manager

- Setting up Territories

- Setting up Calendars

- Setting up Escalation Management

3.1 Setting up Notes

A note records descriptive information that has been generated by users about business transactions so that it may be referenced.

3.1.1 Setting up Notes Type

Oracle CIC comes preseeded with a set of note types. You can create additional customized note types and use them instead of the predefined note types.

You must use the CRM Administrator responsibility to set up note types.

Setting up custom note types involves defining the note types look up code from the Note Type Lookups window.

> **Note:** In order for a note to be used for Knowledge Base search, the note must be defined as a Knowledge Base note type. To make this happen, it is critical for the Service Request note type and Knowledge Base statement type to have identical names. All note types created in Knowledge Management must be prefixed with KB_ to distinguish them from these other note types.

To define note types look up codes:

1. Navigate to the Note Type Lookups window. This window displays all the note types look up codes available in the system.

2. Click any where in the spread table. Now click the New toolbar button to open a blank row.

3. Enter a look up code, its meaning and a brief description. You only need to define a tag for a new, customized note type. The code you enter is internal to the system. Pay special attention while entering the meaning of the code since this is displayed in the LOV for selecting a note type.

4. Enable the note type you have entered by selecting the Enabled check box for the note type. Only enabled note types will be listed in the Note Type LOV.

5. Save your work.

6. If you want to define more note types lookups, repeat steps 2-5.

3.1.1.1 Limiting Note Types Your Users Can Create

Typically, all the note type lookups you create from the Note Type Lookups window will be available from the LOV for selecting note type. You can limit the choices available on this LOV to the note types commonly used by your agency.

> **Note:** Oracle CIC uses a seeded note type Service Request Attribute Details to store all the attribute values (including incident location) captured for a service request.

To limit the note types that your users can create:

1. Log on to the application and assume the Application Developer responsibility

2. Navigate to the Application Lookups window.

3. Query up the JTF_NOTE_TYPE note type. The spread table displays details of all existing note type lookups included under JTF_NOTE_TYPE. The note types listed here are available from the Note Type LOV in Oracle CIC.

4. Click any where in the spread table. Now click the New toolbar button to open a blank row.

5. Enter a look up code, its meaning and a brief description. You only need to define a tag for a new, customized note type. The code you enter is internal to the system. Pay special attention while entering the meaning of the code since this is displayed in the LOV for selecting a note type.

6. Enable the note type you have entered by selecting the Enabled check box for the note type. Only enabled note types will be listed in the Note Type LOV.

7. Save your work.

3.1.2 Mapping Note Types to a Source Application

Mapping a note type to a source application object helps you limit the note types visible in the Note Type LOV in the source application. This allows you to create Note Type LOVs predicated on the source application object. For example, you can assign a few of the note type lookups you have already created to the source application object Service Request. The Note Type LOV available when you are creating a Service Request will list only these note types.

Note that this is an optional step for implementing Oracle CIC. You must use the CRM Administrator responsibility, if you choose to map note types to a source object.

To map note types to source object:

1. Navigate to the Source to Type Mappings window. This window displays all the mappings currently available in the system.

2. Click the New toolbar button to open a blank row.

3. In the Source field, select the source application object you want to map to a note type.

4. In the Note Type field, select the note type you want to assign to the selected source application object.

5. Save your work.

6. If you want to map more note types to source application objects, repeat steps 2-5.

3.2 Setting up Resource Manager

Define resources as the people, places, or things required by Oracle CIC to accomplish its objectives. You can use Resource Manger to import and view resources, define resources, define roles, create teams and groups, and organize resources within those teams and groups. Defining and organizing your resource information makes your resources available to Oracle CIC.

3.2.1 Defining Role Types

A role type, in our context, is a category of roles associated with Oracle CIC. Oracle CIC is preseeded with a set of pre-defined role types. You can add custom role types to suit your specific requirements.

Setting up custom role types involves defining the role types look up code from the JTF_RS_ROLE_TYPE Lookups window. You must use the CRM Administrator responsibility for this purpose.

To define role types:

1. Navigate to the JTF_RS_ROLE_TYPE Lookups window. The spread table in this window lists all the role type lookups available in the system.

2. Click any where in the spread table. Now click the New toolbar button to open a blank row.

3. Enter a look up code, its meaning and a brief description. The code you enter is internal to the system. Pay special attention while entering the meaning of the code since this is displayed in the LOV for selecting a role type. Typically, you would enter the name of the Oracle Application (Oracle CIC) as the meaning since the role type is defined as application specific.

4. Enable the role type you have entered by selecting the Enabled check box. Only enabled role types will be listed in the Role Type LOV.

5. Save your work.

6. Repeat steps 2-5 to define more role type lookups.

3.2.2 Defining Roles

A role may encompass one or more job descriptions and job titles. Use roles to assign jobs to resources, resource groups and resource teams. Oracle CIC is preseeded with a set of pre-defined roles. You can add custom roles, if the preseeded roles do not fit your specific requirements.

You must use the CRM Administrator responsibility to define roles.

To define roles:

1. Navigate to the Roles window.

2. Enter a code and name for the role you are defining. The code you enter is internal to the system, while the name is displayed in all relevant LOVs.

3. In the Type field, select a role type. Note that only existing, enabled role types are available in the LOV. The LOV lists the meaning of the role type rather than the lookup code.

4. In the Description field, enter a brief description of the role you are creating.

5. Select the Active check box to make the role active.

6. Assign job roles by selecting one or more job role check boxes. You can select roles such as Manager, Member, Admin and Lead.

7. In the Jobs region, select the appropriate job titles for each of the job roles you selected in step 6.

8. Save your work.

3.2.3 Creating Employee Resources

You have to create all your Oracle CIC users—CSRs, field service representatives, managers and administrators—as resources. In situations where Oracle Human Resources application is available, the Oracle CIC users may already be created as employees. However, the employee creation process in Oracle Human Resources does not associate employees as parties, which is an essential condition for using

them as resources in Oracle CIC. You can view these employees in Oracle CIC by importing them as resources.

In situations where Oracle Human Resources is not available, you can create resources directly from the People window. In this situation, Oracle CIC allows you to create employees with the requisite party id so that they automatically become resources in Oracle CIC.

To create resourcesOracle CIC:

1. Navigate to the People window.

   You will need to select the New button from the Find Person window to open the People window. You can use the Find Person window to populate the People window with details of an existing resource.

2. Enter the relevant information in the fields. Only the Last Name and Type fields are mandatory for creating resources.

   The party id is automatically assigned by the system and is not visible from the People window.

3. Save your work.

3.2.4 Importing Resources

You can import a resource into Oracle CIC from an Oracle Human Resources database running under the same application instance as Oracle CIC. You can define resources based on any of the following resources from Oracle Human Resource:

- Employee

- Partner

- Party

- Supplier Contact

Please note that you will see the actual name of the employee (and not the user name specified for logging on to Oracle Application) in the LOV when you try to import an employee as a resource.

Importing resources involves:

- Finding the resource from the appropriate category.

- Entering default values for the resource from the Default Values window.

- Reviewing details of the selected resource from the Resource window. While reviewing the resource details, you will need to ensure that the resource is assigned to a resource group you have already created. Also remember to verify that an appropriate Group Member Role Name and position(s) is assigned to the resource.

- Saving the resource definition.

> **Note:** You can use the Synchronize Employees concurrent program to import a large number of resources from your HR system.

To import a resource for Oracle CIC:

1. Navigate to the Selection Criterion window.

2. Use the Selection Criterion window to search for and display details of a resource from Oracle Human Resources, which you want to define as a resource. You will need to:

   a. Select a resource category (employee, party, partner or supplier contact defined in Oracle Human Resources)

   b. One or more parameters that would uniquely identify only the resources you want to import in Oracle CIC. For example, you can use employee name, partner name, party number, supplier contact name, organization, etc. as search criteria to identify resources).

      Note that the search criteria available for selection are determined by your selection in the Resource Category drop-down list.

   c. Select the Search button to list the resources matching the search criteria in the Search Results region.

      Note that you can import multiple resources at a time. For example, you can search for Resource Category Employee with Vision ADB as the Organization to list all the employees belonging to Vision ADB organization.

3. In the Search result region, make sure that only the employee, party, partner or supplier contact you want to import as resource is selected. By default, all the resources retrieved by the search are selected. You will have to deselect the employee, party, partner or supplier contact you do not wish to import as resource.

4. Select the Create Resource button. The Default Values window opens. In this window, you can select the job role for the resources. Note that the selected job role will be inherited by all the resources being imported. Role type is automatically assigned based on the job role you select.

5. Select the Ok button to open the Selected Resources window. This window presents information on the selected resources such as category, name, role type, role, and organization. Examine the Comments column to see if the resource category has already been saved as a resource.

   To view or modify details about a resource listed in this window:

   a. Make sure that only the resource whose details you want to view is selected. By default, all listed resources are selected as indicated by the check mark in the Select check box.

   b. Select the Details button. The Resources window opens. This window presents all the information available for the selected resource. You can update information, if needed.

   c. Save the changes you may have made.

   d. Close the Resources window to return to the Selected Resource window.

6. Select the Save Resource button to save all the selected resource(s) from Oracle Human Resources as resources in Oracle CIC.

   On selecting the Save Resource button, only the selected resources will be created as Oracle CIC resources. By default, all listed resources are selected when you open the Selected Resources window as indicated by the check mark in the Select check box. If you do not want to save one or more resources, be sure to remove the selection from the appropriate Select check box(es).

3.2.5 Creating Resource Groups

Sometimes a resource is not just a person. It can be a group of people and/or pieces of equipment, for example. Dividing these single resources into groups can strengthen their skills and save you time when allocating resources to a task.

When you create a new group, you must assign members to the group and specify their roles and relations. You must also select the application component that can access this group so as to assign it to perform tasks.

To define groups:

1. Navigate to the Define Groups window.

   You can view details of an existing group by performing a search from this window.

2. To create a new group, in the Groups header region:

   a. Enter a group name in the Name field.

   b. Enter a brief description of the group in the Description field.

   c. If you want this group to be active only for a specific period, use the Start and End date fields in the Active Dates region to set the period.

3. To assign members to the group:

   a. On the Members tab, select a member category in the Category field. You can assign resources from categories such as employees, partners, parties and Others to a resource group.

   b. In the Number field, select the unique identifying number (employee number, party number, etc.) of the resource you want to select.

      Values for the Name and Operating Unit fields, if appropriate, are automatically displayed when you select a value in the Number field.

   c. If you want to view details of the current group member, select the Member Details button.

   d. If you want to define roles for the current group member, use the Member Roles button. This opens the Member Roles window from where you can define roles for the current member (resource).

   e. If you want to move a member resource from this group to another, use the Move Member button. This opens the Move Member window, where you can assign the group to which the member is to be moved.

4. On the Roles tab, select a role type and name in the appropriate fields.

5. On the Usage tab, select a usage description in the Usage field.

6. On the Relationship tab, select a group number in the Group Number field. Also select the effective dates for the relationship in the Start and End Date fields.

7. Save your work.

3.2.6 Creating Resource Teams

Resource groups provide candidates for resource teams. But unlike groups, a team is composed of different resource types. Team members represent a resource group, and are chosen for their availability, qualifications, and location. Teams consist of people, places, and things that work together to efficiently complete a project.

Defining a resource team involves selecting the team members, assigning roles to the team and assigning the team to applications that can use it.

To define a resource team:

1. Navigate tot he Define Teams window.

2. Enter a team name in the Name field.

3. Optionally enter a brief description of the team in the Description field.

4. If you want to restrict the effective dates for the team to a specific period, select the beginning and end dates in the Start and End fields in Active Dates region.

5. On the Members tab, select a member type in the Type field. You can use a resource team or individual resource as the resource type to be used for the team.

6. If you selected Individual in the Type field, in the Category field select the Category to which the individual resource belongs.

7. In the Number field, select the group number or the number assigned to the selected category (for example, employee number, party id, etc.).

   Values for the Name and Organization fields, if appropriate, are automatically displayed when you select a value in the Number field.

8. Open the Roles tab.

9. Select appropriate Role Type and Role. The role's relationship to its type is indicated by the selections in the check box.

10. In the Usage tab, select the applications that can use this team.

3.3 Setting up Territories

Defining territories allows you to automatically assign service, and collection teams based on their availability and expertise. You can also use it to make service and collections information more secure by restricting access to citizen data.

Most territories are one dimensional. They assign tasks to employees based on postal code, area code, country, expertise, etc. Oracle CIC makes it possible for you to create multidimensional territories using a number of such criteria.

A territory consists of qualifiers and their values. You can create one or more territories at the same time.

Setting up territories for use with Oracle CIC involves the following stages:

- Planning
- Creating custom qualifiers (Optional)
- Selecting qualifiers
- Creating territories

3.3.1 Planning

Before setting up territories, you must analyze the territory setup in your agency. You will require agency wide cooperation and feedback for this purpose. You should also expect to revise your territory definitions, especially in the initial months of operation.

Here are a few tips to help you plan your territory definitions:

- Review your existing territories.

  You need to collect and analyze information including:

  - Current territory assignment criteria (by state, county, city, zip code, etc.).
  - The names and current territory assignments for your service personnel.
  - The services your agency provides and how they are differentiated.

- Identify the qualifiers that are best suited to restrict your territory definitions.
- Determine the territory hierarchy you want to establish.
- Identify overlapping territories, if any, and the order in which the application picks them.
- Rank any overlapping territories from 1 to n to determine the order. A territory with a smaller rank wins over a territory with a higher rank. In case of a tie, the assignment is made randomly.
- Test your strategy before implementing territories throughout your agency.

3.3.2 Selecting Qualifiers

Oracle CIC provides a large number of preseeded transaction qualifiers and resource qualifiers. In addition to these, you can define custom qualifiers to suit your specific requirements.

By default, the qualifiers you may want to use to delineate your territory are not enabled. To enable them, you have to display the qualifiers in the Setup Qualifiers window by executing a query and select the Enabled check box corresponding to each of them. Note that enabling a qualifier does not automatically assign it as a delineator for territories.

To select qualifiers:

1. From the Administration menu in the Territory Navigator, choose Setup Qualifiers. The Setup Qualifiers window appears.

2. Select the appropriate Oracle Application in the Usage field. Note that each Oracle Application has its own preseeded qualifiers.

3. Use the search function available in the header region of the Setup Qualifier window to find the qualifiers you want to select and enable.:

   a. To find all disabled qualifiers for the selected application, select the Disabled radio button in the Status region. To find all enabled qualifiers, select the Enabled radio button. To find all qualifiers for the selected application, select the All radio button.

   b. Select the Search button.

   The search results appear in the spread table.

4. If you want to find a specific qualifier, run a query using the following steps:

   a. Click any where in the spread table.

   b. From the View menu, select Query By Example > Enter.

   c. Enter the query criteria based on which you want to list qualifiers. Use % as the wildcard character if you are entering a partial value.

   d. From the View menu, select Query By Example > Run.

   The query results appear in the spread table.

5. Select the Enabled check box for each qualifier you want to enable. An enabled qualifier can be identified by the check mark in the Enabled check box.

6. Select the Update Qualifiers button to save your work.

3.3.3 Setting up Territory Types

A territory type is a grouping of transaction qualifiers you can use to simplify and systematize the territory creation process. Territory type helps group transaction qualifiers used for creating territories to saves you time when you are creating similar territories. For example, if you want to create territories by geographical area you can create a territory type with the Country and Postal Code qualifiers.

Oracle CIC is preseeded with the appropriate territory types to handle normal operations. You can create custom territory types to suit your specific requirements.

To create a territory type:

1. From the Administration menu in the Territory Navigator, choose Create Territory Type. The Create Territory Type window appears.

2. Set the View By filter in the Navigator to Territory Type. The Navigator displays the existing territory types as nodes on the navigation tree.

3. In the Usage field in the Create Territory window, select the oracle application for which the territory type is being created. Note that territory types are application specific.

4. Enter a name for the territory type and a description.

5. If you wish to limit the use of this territory to a specific period, then enter an end date.

6. In the Transaction Type field, use the LOV to select one or more transaction types belonging to the selected application. The transaction types you select determine the operations that the resources defined for this territory type would perform.

7. In the Qualifiers region, select the transaction qualifiers that would delineate the territories you create for this transaction type. These qualifiers determine the boundaries of the territory, and the resources that are available to be scheduled for performing the tasks associated with the selected transaction types.

8. If you wish to allow overlap for a qualifier, then retain the selection in the Allow Overlap check box. Allowing overlap allows you to assign overlapping territory values to the same qualifier. For example, assume that you are creating a territory for John Smith with Postal Code as the qualifier. Also assume that the postal code values are 94400 - 94410 and 94408 - 94420. In this situation, by enabling overlap, you can enter both ranges as values for the qualifier. With no overlap, Oracle CIC prevents you from entering the second range of values for the qualifier.

9. Select Update Type to save your work.

3.3.4 Defining Territories

A territory consists of qualifiers and their values. You can create one or more territories at the same time. To simultaneously create multiple territories, you must use the territories template.

During the territory creation process, you can define the transaction qualifiers to limit the types of transactions that will be performed by the resources assigned to the territory. You can also specify the parameters (rules) based on which resources are assigned to the territory. The rule you build to associate resources to the territory and the subsequent selecting of resources should be based on the considerations arising out of the transaction types defined for the territory.

Oracle CIC allows you to assign resources to create a pool of resources for the territory. These resources can be scheduled to perform the tasks associated with a service request raised from within the qualifiers defining the territory. Note that you may already have associated resources with territories while defining the territory.

To define a territory:

1. From the Administration menu in the Territory Navigator, choose Define Territory.

   The Territory Details window opens. Information on this window is organized on five tabs.

2. In the Usage field, select the Oracle Application that will use this territory.

   The Select Parent Territory window opens.

3. Select the appropriate parent territory. This value appears in the Parent field.

4. In the Name field enter the name for your territory. Also, optionally enter a description for the territory in the Description field.

5. If you want to limit the time the territory is effective, then enter the appropriate date in the End Date field. By default, the territory become effective on the date you create it.

6. If you want to define an escalation territory, select it in the Escalation Territory field (see Defining Escalation Territories). You can select an escalation territory only if you already have created an escalation territory for the application selected in the Usage field.

7. In the Transaction Type field, use the LOV to select one or more transaction types assigned to the selected territory type. The transaction types you select determine the operations that the resources defined for this territory would perform.

8. If you wish to assign this territory to an existing territory type, then select it in the Type field. This would restrict the available territory qualifiers to those set up in the selected territory type.

To define the transactions to be handled by the territory:

9. Open the Transaction Qualifiers tab.

10. If this territory is part of a hierarchy of territories, then select Show Inherited Qualifiers button to examine the qualifiers this territory inherited from its parent territories). You do not want to use any of these qualifiers in the territory you create to avoid duplication.

11. If you are creating a new territory without a territory type, then select the appropriate qualifiers in the Transaction Qualifiers region. The selection available on the LOV will depend on the selected application.

    If you have used a territory type to create this territory then the qualifiers are inherited from it.

12. If you do not wish to allow overlapping of qualifier values, then remove the selection from the Overlap Allowed check box. Overlapping is allowed by default.

To define the criteria for selecting resources for the territory:

13. Open the Resource Qualifiers tab.

14. Define the criteria based on which resources be selected for being assigned to the current territory. On this tab, you can select a resource qualifier (for example, competence) and create a rule (for example, competence = fire safety and proficiency level = expert) so that only the resources who are expert in fire safety is assigned to the territory.

To associate resources with the territory:

15. Open the Resources tab. This tab displays the resources, if any, currently assigned to the territory. It also shows the access types defined for the current resource.

16. If you want Oracle CIC to automatically select the resources based on the resource qualifiers you have defined:

    a. Select the Auto Assign Resources button. The Qualifying Resources window opens. This window lists all the resources that meet the requirements you have defined on the Resource Qualifiers tab.

    b. Select the Assign check box corresponding the resource(s) you want to assign to the territory.

    c. Select the OK button to assign the resources to the territory.

17. If you want to manually assign resources from the Resources tab:

    a. Select a resource in the Name field in the Resources region. The LOV for this field allows you to select resources regardless of the resource qualifiers you may have entered on the Resource Qualifiers tab.

    The resource type is automatically displayed.

    b. In the Group field, optionally select the group to which the resource belongs.

    c. In the Role Name field, optionally enter the role of the resource in the group.

The resources you have selected for assigning to the territory (whether from the LOV or from the Qualifying Resources window) are listed on the Resources tab. These resources are, by default, given full access privileges. You can limit the access privileges of a resource by selecting the access type for each resource.

18. If you do not want the resources to have full access privileges, remove the selection from the Full Access check box. If you remove this selection, you should define the appropriate access type for the resource in the Access Type region.

19. If you want to define the resource as the primary contact for the territory, select the Primary Contact check box. You can define multiple resources as primary contacts.

20. If you want the resource assignment only for a specific period of time, for each resource, select the date when the resource assignment would become ineffective.

21. Save your work.

3.3.5 Assigning Territories to Planner Groups

Planner groups are groups of resources dedicated to planning and are setup in Resource Management. Territories consist of service representatives and are setup in Territory Management.

Once a planner group is setup, it becomes the default group of territories shown to a planner group in the Control Tower.

Territories are assigned to planner groups from the Assign Territories to Planner Groups setup window. When you open this window, you are prompted to select a resource group. Choose the resource group that represents the planner group that you want to assign to territories.

Select a territory from the list of values you want to add to the planner group. You can add multiple territories to a planner group.

3.3.6 Defining Escalation Territories

Escalation territories are alternate territories where transactions are automatically reassigned when certain conditions are not met for example, when a service call is not answered for five days). Escalation territories define the teams that will handle the escalations. Please note that the escalation territories are application specific.

To create escalation territories:

1. From the Administration menu in the Territory Navigator, choose Define Territory Escalation.

   The Escalation Territory Details window opens. Information on this window and the data that needs to be entered are identical as that for creating territories.

2. Follow steps 2-21 discussed under the Defining Territories section.

3.3.7 Generating Territory Packages

Generate Territory Packages is a pre-seeded concurrent program that generates the territories and resources that can be assigned to a service request. This concurrent program must be run every time a territory is added or changed in Oracle CIC.

To run Generate Territory Packages:

1. Using the CRM Administrator responsibility, navigate to the Submit Request window. You will need to select the Single Request radio button from the Submit a New Request window to open this window.

2. In the Name field, select Generate Territory Packages.

   The Parameters window opens.

3. In the Usage field, select the application for which the territory is defined (in our case, Oracle Service). The program will generate territories and resources only for the selected application.

4. In the transaction Type field, select the transaction qualifier defined for the selected territory usage (for example, Service Request). The program will generate territories and resources only for the selected transaction qualifier. Transaction qualifiers are specified when defining territories. You will need to run the program again to generate resources and territories for other transaction qualifiers.

5. Select No as the value in the Debug Flag and SQL Flag fields.

6. Select OK to save the parameters and return to the Submit Requests window.

7. Set the schedule based on which the Generate Territory Packages concurrent program is to be run. You would need to run this program every time a territory is added or modified.

8. Open the Upon Completion window and set the actions that need to be performed after completing the program. To open this window, select the Options button.

9. Select the Submit button to submit the Generate Territory Packages concurrent program. The program will be executed based on the schedule you have specified.

3.4 Setting up Calendars

Calendar is a tool used to define and view available and non-available time for a resource or group of resources. You can create a calendar for yourself or for another resource, associate work shifts with calendars, and assign a resource to a shift depending on availability.

3.4.1 Defining Calendar Types

Calendar helps you define and view available and non-available time for resources. You can create a calendar and associate work shifts with it and assign resources to it based on resource availability.

A calendar type, in our context, is a category of calendars associated with Oracle CIC. Oracle CIC is preseeded with a set of pre-defined calendar types. You can add custom calendar types to suit your specific requirements.

Setting up custom calendar types involves defining the calendars types look up code from the Calendar Types Lookups window. You must use the CRM Administrator responsibility for this purpose.

To define calendar types:

1. Navigate to the Calendar Types Lookups window. The spread table in this window lists all the calendar type lookups available in the system.

2. Click any where in the spread table. Now click the New toolbar button to open a blank row.

3. Enter a look up code, its meaning and a brief description. The code you enter is internal to the system. Pay special attention while entering the meaning of the code since this is displayed in the LOV for selecting a calendar type.

4. If you wish to limit the use of this calendar type to a specific period, then enter the From and To dates.

5. Make sure that the Enabled check box is selected. Only enabled calender types can be used in Oracle CIC.

6. Save your work.

3.4.2 Defining Availability Types

Availability types for resources help define common categories that define the availability of resources. Oracle CIC is preseeded with a set of pre-defined availability types. You can add custom availability types to suit your specific requirements.

Setting up custom calendar types involves defining the availability type look up code from the Availability Types Lookups window. You must use the CRM Administrator responsibility for this purpose.

To define availability types:

1. Navigate to the Availability Types Lookups window. The spread table in this window lists all the availability type lookups existing in the system.

2. Click any where in the spread table. Now click the New toolbar button to open a blank row.

3. Enter a look up code, its meaning and a brief description. The code you enter is internal to the system. Pay special attention while entering the meaning of the code since this is displayed in the LOV for selecting an availability type.

4. If you wish to limit the use of this availability type to a specific period, then enter the From and To dates.

5. Make sure that the Enabled check box is selected. Only enabled availability types can be used in Oracle CIC.

6. Save your work.

3.4.3 Defining Exception Categories

Calendar exception categories help define common exception groups (for example, "normal leave" my be setup as a category that includes vacation, sick leave, etc.) for calendar resources. Oracle CIC is preseeded with a set of exception categories. You can add custom categories to suit your specific requirements.

Setting up exception categories involves defining calendar exception category look up codes from the Calendar Exception Category Lookups window. You must use the CRM Administrator responsibility for this purpose.

To define calendar exception categories:

1. Navigate to the Calendar Exception Category Lookups window. The spread table in this window lists all the exception categories existing in the system.

2. Click any where in the spread table. Now click the New toolbar button to open a blank row.

3. Enter a look up code, its meaning and a brief description. The code you enter is internal to the system. Pay special attention while entering the meaning of the code since this is displayed in the LOV for selecting an exception categories.

4. If you wish to limit the use of the exception category to a specific period, then enter the From and To dates.

5. Make sure that the Enabled check box is selected. Only enabled exception categories can be used in Oracle CIC.

6. Save your work.

3.4.4 Defining Exception Reasons

Exception reason lookups allow the defining of reasons based on which calender exceptions would be permitted for resources.

Setting up exception reasons involves defining exception reasons look up codes from the Calendar Exception Reason Lookups window. You must use the CRM Administrator responsibility for this purpose.

1. Navigate to the Calendar Exception Reason Lookups window. The spread table in this window lists all the exception reasons existing in the system.

2. Click any where in the spread table. Now click the New toolbar button to open a blank row.

3. Enter a look up code, its meaning and a brief description. The code you enter is internal to the system. Pay special attention while entering the meaning of the code since this is displayed in the LOV for selecting an exception categories.

4. If you wish to limit the use of the exception reason to a specific period, then enter the From and To dates.

5. Make sure that the Enabled check box is selected. Only enabled exception reasons can be used in Oracle CIC.

6. Save your work.

3.4.5 Defining Calendars

Calendar helps you define and view available and non-available time for a resource or group of resources. You can create a calendar and associate work shifts with it and assign resources to it based on resource availability.

In order for your shifts and times to appear in the datebook, you must create a calendar. Once your calendar is defined, then you can link your shifts and times to it.

To define a calendar:

1. Navigate to the Calendar window.

2. In the Name field, enter a name for the calendar you are defining.

3. In the Type field, select the calendar type under which this calendar is to be grouped. Custom calendar types, if any, you may have define would be available in the LOV for selection.

4. In the Description field, enter a description for the calendar.

5. If you wish to limit the use of the calendar to a specific period, then enter the To date.

6. Save your work.

3.4.6 Defining Shifts

A shift defines when a person is available to work. For example a shift may define the Monday to Friday 8:30 to 17:00 hours. You can define the shift for the entire week or for certain days of the week. Shifts can then be attached to the calendar.

To define a shift:

1. Navigate to the Define Shifts window.

2. In the Name field, enter a name for the shift you are creating.

3. In the Description field, enter a description of the shift.

4. If you wish to limit the use of the shift to a specific period, then enter the To date in the Effective Dates region.

5. Use fields in the Shift Pattern area to define the shift. You can define a shift based on the normal working hours and patterns in your agency.

6. In the Weekday field, select the day for which shift pattern is being specified. You can also include recurring off (for example Saturday and Sunday) days in the shift definition.

7. In the Begin field, select the time at which the shift begins. For non-working days, the start time is the same as the end time (for example, 0.00).

8. In the End field, select the time at which the shift ends. For non-working days, the end time is the same as the start time (for example, 0.00).

9. In the Availability Type field, enter the common category that define the availability of resources.

10. If you want to obsolete the shift definition after a time period, use the Effective Dates To field to specify the date when the shift definition would become inactive.

11. Click the New toolbar button to start a new row where you can define the shift for a different weekday.

12. Repeat steps 5-10 to define shifts for other weekdays.

3.4.7 Defining Exceptions

When you set up a calendar, you must define not only the working hours, but also the times when you are not available for work, such as federal holidays, vacation, or sick days. These exceptions can be assigned to the shifts you have defined so as to create exceptions to the regular working shift.

Non-available time is a defined block of time when a resource is not available to accept a task. Non available time can comprise:

- A personal entry
- An entry or task sent by another resource.
- A group appointment or entry created by the resource or another resource.

- Public holidays

- Meetings

- Personal vacation

- Illness

- Personal or work appointment.

To define exceptions:

1. Navigate to the Exceptions window.

2. In the Name field, enter a name for the shift exception you are creating.

3. In the Category field, select an exception category. An exception category groups the reasons for deviating from a shift. Custom exception categories, if any, you may have define would be available in the LOV for selection.

4. In the Description field, enter a description of your exception.

5. Use the Effective Dates From and To fields to specify the period when this exception would be in force.

6. Save your work.

3.4.8 Assigning Shifts/Exceptions

Shifts and exceptions become active only when they are assigned to the FS Calendar (Field Service calendar). Assigning shifts and exceptions to the FS Calendar ensure that they are available in the datebook.

To assign shifts/exceptions:

1. Navigate to Assign Shift/Exceptions window. This window comprises two tabs: Shifts and Exceptions. Use these tabs to assign shifts and/or exceptions to the current calendar.

   The header region of this window is populated with details of the default calendar (FS calendar).

2. Execute a query to fetch and display the details of the calender to which you want to assign shifts/exceptions.

3. To assign a shift to the current calendar, on the Shifts tab:

   a. In the sequence field enter the sequence number for the shift assignment.

   b. In the Name field, select the shift you want to assign to the current calendar.

   c. In the Duration field, select the number of days when this shift would remain assigned to the calendar.

   d. In the From field, select the start date when this shift assignment would become effective. You can change the default date, if needed.

   e. Save your work. Oracle CIC calculates the end date for the shift assignment and displays this date in the To field.

   f. Repeat steps a - e to assign more shifts to the current calendar.

4. To assign exceptions to the current calendar, on the Exceptions tab:

   a. In the Name field, select the exception you want to assign to the current calendar.

   b. In the Reason field, optionally select the reason why this exception is being assigned tot he calendar.

   c. In the From field, select the start date when this exception would become effective. You can change the default date, if needed.

   d. In the To field, select the date when this exception would become ineffective.

   e. Repeat steps a - d to assign more exceptions to the current calendar.

5. Save your Work.

3.4.9 Assigning Calendar Resources

Resources can be assigned to calendar based on factors such as their work time (shift), availability, and location. Resources assigned to a calendar would typically be associated with the shifts and exceptions defined for the calendar.

To assign resources to a calendar:

1. Navigate to the Assign Calendar Resources window.

   Execute a query to fetch the calender to which you want to assign resources. The header region of the window displays details of the selected calendar.

2. In the Resource Type field, select the type of resource you want to attach to the calendar.

3. In the Name field, select the resource you want to assign to the current calendar. The resource type you have selected in step 2 determines the resources available for selection.

4. In the Primary Calendar Flag field, select Yes if the current calendar is to be set as the primary calendar for the resource.

5. If you want to limit the resource assignment to a specific period, use the Effective Dates To field to specify the last day of the period.

6. Repeat steps 2- 5 to define more resource assignments.

7. Save your work.

3.5 Setting up Escalation Management

Escalations occur in support centers for a wide variety of reasons. The escalation management component of Oracle CIC helps you identify, track, monitor, and manage situations that require increased awareness and swift action.

Basic information for escalation management such as the requester, problem, the required resolution date, and additional contacts that are involved, is captured in an escalation document.

Escalations are managed by creating an escalation document, assigning an escalation owner, defining the actions needed to resolve the escalation, and communicating the progress. Once a situation is de-escalated, the escalation closure note is captured and a final communication is sent to the contacts involved.

The Escalation Manager provides two types of escalation management:

- Reactive, or activity in response to a customer behavior

- Proactive, or an automated response to a violation of business rules

Notifications are an integral part of the escalation functionality. Oracle Workflow is used to process and deliver the notifications regarding the escalation activity. A workflow process controls the Business Rule Monitor, which in turn periodically checks the relevant business rules. The user that owns this workflow process receives notifications when the process starts, stops, or encounters an error.

Escalation Management provides pre-defined business rules. You may design your own rules that have been customized for your agency.

Setting up escalation management involves:

- Setting the escalation lookup codes

- Starting the escalation manager workflow process

- Defining escalation statuses (optional)

- Defining escalation reference codes (optional)

- Defining escalation reason codes (optional)

3.5.1 Setting up Escalation Lookup Codes

Defining escalation related lookup codes helps you specify the values available for selection from the LOVs in escalation related fields. Oracle CIC is preseeded with a number of lookup codes for escalation level, reason, contact type and reference. You can create your own codes to suit your specific requirements. By default, Oracle CIC provides lookup codes that define the values available for:

- Dependency types for task lookups

- Rules associated with task types

- Alarm type to be used to alert citizens about escalations

- Escalation reasons

- Contact types

- Escalation Levels

- Reference codes for task lookups

To define lookup codes:

1. Navigate to the appropriate window for defining lookup. Use:

    - Dependency Types for Task Lookups window to define dependency types lookup codes.

    - Rules Associated with a Given Task Type window to define the rules associated with a task type.

    - JTF_TASK_ALARM_TYPE Lookups window to define the alarm type to be used to alert citizens about escalations.

    - Escalation Reasons Lookups window to define escalation reasons.

- - Contact Types Lookups window to define contact type lookup codes.

  - Escalation Levels Lookups window to define escalation levels.

  - Reference Codes for the Tasks Lookups window to define reference codes.

2. Click any where in the spread table. Now click the New toolbar button to open a blank row.

3. Enter a name for the lookup code in the Code field. The code name is internal to the system.

4. Enter a user name for the lookup code in the meaning field. This value is displayed in the LOV.

5. Optionally enter a description in the Description field.

6. If you want the look up code to be effective only for a specific period, set the period by using selecting the Effective Dates From and To fields.

7. Verify that the Enabled check box is selected. Only enabled lookup codes will appear in the LOV.

8. Save your work.

3.5.2 Starting the Escalation Manager Workflow Process

Escalation Manager uses the JTFEC (Reactive Escalation Notification) workflow process. You must submit it as a concurrent process and start it to ensure proper functioning of the Escalation Manager. Note that all reports and programs in Oracle Applications are run as concurrent processes. For detailed information, please refer to the section titled "Using Standard Request Submission" in *Oracle Applications User's Guide*.

To start the workflow process:

1. Navigate to the Submit Request window. You will need to select the Single Request radio button from the Submit a New Request window to open this window.

2. In the Type field, select Workflow Background Process.

    The Parameters window opens.

3. In the Item Type field, select Reactive Escalation Notification.

4. Leave the Minimum Threshold and Maximum Threshold fields empty.

5. Select Yes for both the Process Deferred and the Process Timeout fields.

6. Select OK to return to the Submit Requests window.

7. Set the schedule based on which the workflow process is to be run. You would need to run this process periodically. Select the Schedule button to open the Schedule window where you can set the scheduling options for this workflow process.

8. Open the Upon Completion window and set the actions that need to be performed after completing the workflow process. To open this window, select the Options button.

9. Select the Submit button to submit the workflow process.

3.5.3 Defining Escalation Statuses

Escalation Manager uses the following three pre-defined escalation statuses. You can define custom statuses to suit your specific requirements. Please note that the defining of escalation statuses is optional.

- Open (escalation is open)

- Working (escalation is assigned to a resource who is working on it)

- Closed (escalation is closed)

To define escalation statuses:

1. Navigate to the Task and Escalation Status window. This window lists the existing escalation statuses in the system.

2. Select the New toolbar button to open a new row in the spread table.

3. Enter a name for the status you are defining.

4. Optionally enter a description, which explains the purpose of the status.

5. Optionally use the From and To fields to set the period when the status will be effective.

6. In the usage field, make sure that Escalation is selected. Task statuses are used by the Task Manager and are not available to the Escalation Manager.

7. Select escalation status flags. The status flags you can set are explained in the following table.

8. Save your work.

Check box	Explanation
Assigned	Assigned to a resource.
Working	In progress
Schedulable	Scheduled or re-schedulable
Accepted	Accepted by owner
Rejected	Rejected by owner
On Hold	Temporarily not active
Approved	Approved by management
Completed	Completed by owner
Cancelled	Cancelled by owner, creator, or management
Delete Allowed	Delete acceptable without cancellation
Closed	Completed and closed
Seeded	Pre-defined task status

3.5.4 Defining Escalation Reference Types

A document or task may be combined with several other documents or tasks, such as when fulfilling a service request requires a series of tasks to be performed and related documents to be completed. In such a scenario, if only one document or task needs to be escalated, the escalation might not apply to the other related items.

You can associate an escalation reference to the escalated item to point to the related items and indicate their relation. There are two pre-defined escalation reference types: FYI and Escalation. Use FYI (for your information) reference type to indicate the task or document related to the escalated item, but is not escalated with the item. Use the escalation reference type to indicate the task or document that is escalated along with the escalated item.

Escalation reference types are lookup codes. You can create customized escalation reference types to suit the specific requirements of your agency. Please note that the creation of escalation reference types is optional.

To define customized escalation reference types:

1. Navigate to the Reference Codes for the Task Lookups window.

2. Click any where in the spread table. Now click the New toolbar button to open a blank row.

3. Enter a name for the lookup code in the Code field. The code name is internal to the system.

4. Enter a user name for the lookup code in the meaning field. This value is displayed in the appropriate LOV.

5. Optionally enter a description in the Description field.

6. If you want the look up code to be effective only for a specific period, set the period by using selecting the Effective Dates From and To fields.

7. Verify that the Enabled check box is selected. Only enabled lookup codes will appear in the LOV.

8. Save your work.

3.5.5 Defining Escalation Reason Codes (Optional)

Defining escalation reason lookup codes allow you to customize the LOV from which reasons for escalating a service request or task can be selected. Oracle CIC provides a few preseeded reason codes; you can add additional lookup codes for indicating escalation reasons specific to your agency.

To define customized escalation reason codes:

1. Navigate to the Escalations Reasons Lookups window.

2. Click any where in the spread table. Now click the New toolbar button to open a blank row.

3. Enter a name for the lookup code in the Code field. The code name is internal to the system.

4. Enter a user name for the lookup code in the meaning field. This value is displayed in the appropriate LOV.

5. Optionally enter a description in the Description field.

6. If you want the look up code to be effective only for a specific period, set the period by using selecting the Effective Dates From and To fields.

7. Verify that the Enabled check box is selected. Only enabled lookup codes will appear in the LOV.

4

Implementing Citizen Management

This chapter provides detailed implementation steps and instructions on how to implement the Contact Center. This chapter comprises the following topics:

- Setting up Citizen Profile
- Setting up Relationship Plans

4.1 Setting up Citizen Profile

4.1.1 Defining Contact Center Specific Lookup Codes

Defining contact center specific lookup codes helps you specify the values available for selection from the LOVs in contact center related windows. By default, Oracle CIC provides lookup codes that define the values available for:

- Reasons for overriding the criticality of citizens
- Relationship plan groups to which citizens can belong
- Status of relationship plans
- Categories for grouping profiles
- Ratings for profile check value

To define contact center specific lookup codes:

1. Navigate to the Customer Care Lookups window.

2. Run a query to display the details of the lookup type under which you want to define the lookup code. The following contact center related lookup types are preseeded in Oracle CIC:

   - CSC_CRITCUST_OVERRIDE_REASONS

   - CSC_PLAN_GROUP

   - CSC_PLAN_STATUS

   - CSC_PROF_CATEGORIES

   - CSC_PROF_RATINGS

3. Click any where in the spread table. Now click the New toolbar button to open a blank row.

4. Enter a name for the lookup code in the Code field. The code name is internal to the system.

5. Enter a user name for the lookup code in the meaning field. This value is displayed in the LOV.

6. Optionally enter a description in the Description field.

7. If you want the look up code to be effective only for a specific period, set the period by using selecting the Effective Dates From and To fields.

8. Verify that the Enabled check box is selected. Only enabled lookup codes will appear in the LOV.

9. Save your work.

4.1.2 Defining Citizen Profiles

Citizen Profile displays relevant summarized information about the citizen that is appropriate for the CSR to know. It may contain information such as the number of open service requests. These profile checks are flagged by appropriate ratings and colors which provide instant visual clues to the CSR to assist in appropriate engagement with the citizen. Citizen Profiles also furnish the ability to drill down from a profile check to a detailed list and then to the original transaction.

You can define profile checks, and combine multiple checks with complex criteria. It is also possible to define critical citizen criteria by using profile checks.

The profile engine (a concurrent program) runs periodically to check and store changes to profile checks.

Use the Customer Profile Setup window to define the profiles based on critical citizen information is to be presented on the Contact Center.

Follow these steps to setup Customer Profiles:

- Define Profile Rating Lookup Codes

- Define Profile Variables

- Define Drilldowns

- Define Profile Checks

- Define Profile Groups

- Define Dashboard Groups

- Associate Profiles with Modules

- Define Preferences

    - Define Rating Labels

    - Define Categories

- Run the Customer Profile Engine

4.1.3 Defining Profile Rating Lookup Codes

You define profile ratings lookup codes to create the different profile option checks that would be displayed in the Contact Center. The profile rating codes will have to be assigned to profile checks so as to present meaningful information on the contact center.

For detailed procedures on creating profile rating lookup codes, refer to Defining Contact Center Specific Lookup Codes.

4.1.4 Defining Profile Variables

A profile variable contains the SQL statement that is executed to retrieve the customer profile value. Other attributes include table columns to be used for drilling down.

SQL statements can contain two bind variables:

- :party_id - Use this variable if the SQL statement refers to a particular party

- :cust_account_id - Use this variable if the SQL statement refers to a particular account for a citizen

No other bind variables are supported.

To define a profile variable:

1. In the Customer Profile Setup window, navigate to the Profile Variables tab. This tab opens by default when you open the Customer Profile Setup window.

2. In the Name field, enter the name for the profile variable.

3. The Code field reflects the name you enter in the Name field. You can substitute the value in the Code field with another unique value.

4. Optionally enter dates in the Active: From and Active: To fields.

5. Optionally enter a description of the profile variable in the Description field.

6. Optionally enter a currency code in the Currency field.

7. Enter the appropriate components of the SQL statement in the following fields:

    - Select (mandatory field).

    - From (mandatory field).

    - Where (mandatory field).

    - Other (optional field for including clauses such as Order By).

8. To validate the SQL statement, select the Validate button.

9. Save the profile variable. When you save the profile variable, the SQL statement is validated. You cannot save an invalid SQL statement.

4.1.5 Defining Drilldowns

There are two levels of drilldowns that you can define. The first level of drilldown provides a summary list of the transactions which are displayed when you click any key indicator (profile check) displayed on the Dashboard tab or Profile region in the Contact Center. The second level of drilldown allows you to drilldown to the transaction form. Drilldowns need to be connected to the profile variables you have defined in the previous step.

To define the first level of drilldown:

1. In the Customer Profile Setup window, navigate to the Drilldown tab.

2. In the Variable field, select the profile variable for which you want to define the drilldown. The Description field as well as the Tables and Views region display relevant information on the selected profile variable.

3. In the Columns region, enter a user-friendly name for the column in the Display Name field. This name will be displayed in the summary list. You can choose up to twenty columns to display in the summary list.

4. Select the Show check box associated with the columns that you want to display on the Summary list.

5. Optionally, select the Build button to generate the SQL for the drilldown.

6. Save your work. Oracle CIC validates the SQL statement when you save. You cannot save an invalid SQL statement.

To define the second level of drilldown:

7. In the Drilldown Module field on the Drilldown tab, select the application module which is to be linked to the profile variable. If the required drilldown object type is not available in the LOV for the Drilldown field, you can define a new one using the following steps:

   a. Select the New button. The Task Setup: Object Types window opens.

   b. In the Object Code field, enter a code that begins with 'CSC_PROF'. An example is CSC_PROF_CSXSRISV.

   c. In the Function Name field, select the form function for the drill down object type.

   d. Optionally enter a description and effective period for the drilldown object type.

   e. Optionally enter the parameters for the drilldown object type in the Parameters field.

   f. Use the fields in the Statement Details region to create the SQL statement for selecting the drilldown object type.

   g. Select the Check Syntax button to validate the SQL.

   h. Save your changes and close the Task Setup: Object Types window.

    The new object code should now be available in the Drilldown Module field of the Drilldown tab.

  The Tables and Views section on the Drilldown tab lists all of the tables and views that are used by your SQL statement. When you click on the table or view name, the columns of this particular table or view are displayed.

8. In the Columns section, select one column as the ID column using the Id radio button. This is the column which allows the drilldown to the transaction screen. For example, if service request number is defined as the ID drilldown column, clicking on the service request number in the summary list of the transactions opens the Service Request window containing the details of the service request. Note that only one ID column can be present for a profile variable.

9. Save your work.

4.1.6 Defining Profile Checks

Profile checks are created using one or more profile variables. Profile checks incorporate business rules upon which the profile values are based and are associated with grading levels and values. Each grade can have a different label and can be associated with a color. Profile checks can also have threshold values. A threshold indicates an upper or lower boundary for the profile check. A profile check can be configured so that it is displayed only when the check value crosses the threshold.

To define profile checks:

1. In the Customer Profile Setup window, navigate to the Profile Checks tab.

2. Enter a name for the profile check in the Name field.

3. The Code field defaults to the name you enter in the Name field. You can substitute the value in the Code field with another unique value.

4. Enter a description for the profile check in the Description field.

5. Optionally enter the period when the profile check is to be in force by specifying the Active From and Active To fields.

6. In the Type field, select the profile check type you want to create. The choices are Variable and Yes or No.

7. If you are using variable as the profile, check type, in the Variable field select a variable. This is the variable on which the profile check is to be based.

8. In the Data Type field, enter the data type for the variable you have selected. The choices are Number, Char, Date and Boolean. You can only use Boolean as the data type if the profile check type selected is Yes or No. To define a boolean profile check:

   a. In the Type field, select Yes or No. The Data Type field defaults to Boolean.

   b. In the Rules section, build a logical condition (rule) for comparing one or more existing profile variables.

   c. Save the profile check you have defined.

9. In the Format Mask field, enter a format mask, if appropriate.

10. In the Ratings section, define set(s) of numeric low and high values to represent the different value ranges. Also select an appropriate label for the rating set. The color appropriate to the rating will be automatically assigned after you select a label.

11. If needed, set the threshold for the rating and select a label for it. To define the threshold for the current rating, click the Upper or Lower radio button in the Threshold section. This threshold is used later in Profile Groups and Dashboard Groups.

12. Save your work.

4.1.7 Defining Profile Groups

A profile group is a set of profile checks that are to be displayed together. The profile checks inside a group can be sequenced. The group can be associated with a form name to indicate the check values and the order in which they are displayed when viewing the profile from that form.

You must define Profile Checks before you can define Profile Groups.

To define profile groups:

1. In the Customer Profile Setup window, navigate to the Profile Groups tab.

2. In the Name field, enter a name for the profile group. The Code field defaults based on the value you entered in the Name field. Also, all existing profile checks are displayed in the checks region.

3. In the Description field, optionally enter a description for the profile group you are defining.

4. In the Customer Type field, select the customer type you want to associate with the profile group. You can choose Person, Organization, or All as the customer type. For instance, you can create Profile Group A for Organizations and Profile Group B for Persons. If a caller calls on behalf of an organization in a B2B scenario, then Profile Group A displays. If a caller calls on behalf of himself in a B2C scenario, then Profile Group B is displayed.

5. Optionally enter dates in the Active From and Active To field.

6. In the Checks section, follow these steps:

    a. Select the appropriate profile check from the Profile Checks column and move it to the Group Checks column. Use the right and left arrow buttons to move the profile checks between the columns. Use the up arrow and down arrow buttons to move the selected group check up or down in the list.

    b. Select the Display on Threshold check box if you want the check to be displayed only when the threshold level has been crossed. For example, if the upper limit of Open Service Requests is 20 and the citizen opens her 21st service request, the profile check will appear in the dashboard. If you want to display a profile only when a threshold is crossed, you must have a threshold defined for this profile check.

7. Save your work.

4.1.8 Defining Dashboard Groups

The Dashboard Groups tab is used for defining groups of profile checks that are displayed on the Dashboard tab of the Contact Center.

To define dashboard groups:

1. In the Customer Profile Setup window, navigate to the Dashboard Groups tab.

2. Enter a name for the Dashboard Group in the Group field. The Code field defaults based on the value you entered in the Name field.

3. Enter a description for the Dashboard Group in the Description field.

4. In the Customer Type field, select the customer type you want to associate with the dashboard group. You can choose Person, Organization, or All as the customer type.

5. Optionally, in the Active From and Active To fields, enter the period when the dashboard group is to be active.

6. In the Categories section, select the categories for the Dashboard Category. To do this, move the categories you want to include in the dashboard from the Category column to the Dashboard Categories column.

   Use the right and left arrow buttons to move the Categories between the columns. Use the up arrow and down arrow buttons to move the selected dashboard category up or down in the list. This sequence determines the display sequence on the Dashboard tab of the Contact Center.

   Categories help group profile checks. For example, open, escalated and accepted tasks can all be grouped under the Tasks category. This helps to organize the display on the Dashboard tab of the Contact Center. Categories are created from the Preferences tab of the Customer Setup Profile window.

7. Save your changes. If you do not save your changes, then your dashboard categories will not be available in the next step.

8. In the Category field in the Checks section, select the category for which group checks are to be defined. Use the right and left arrow buttons to move the profile checks between the columns labeled Profile Checks and Group Checks. Use the up arrow and down arrow buttons to move the selected group check up or down in the list. This sequence determines the display sequence on the Dashboard tab of the Contact Center.

9. Select the Display on Threshold check box if you want the check to be displayed only when the threshold level has been crossed. For example, if the upper limit of your threshold is 20 and this threshold is crossed, the profile check will appear in the dashboard. If you want to display a profile only when a threshold is crossed, you must have a threshold defined for this profile check.

10. Save your work.

4.1.9 Setting Preferences

From the Preferences tab of the Customer Profile Setup window helps you define rating labels, dashboard categories and the modules to be associated with the citizen type and dashboard/profile group

4.1.9.1 Defining Rating Labels

Rating labels helps CSRs easily identify a profile rating by giving it an appropriate name. Profile ratings are defined on the Profile Checks tab of the Profile Setup window. Use the Rating labels section of the Customer Profile Preferences tab to define rating labels and assign colors to the ratings.

To define rating labels:

1. In the Customer Profile Setup window, navigate to the Preferences tab.

2. In the Rating Labels region, select a rating from the Rating list of values.

3. Select a color to associate to the rating from the Color list of values.

4. Save your work.

4.1.9.2 Defining Categories

Categories help group profile checks on the Dashboard tab of the Contact Center. Use the Categories section of the Preferences tab to define categories. For example, open, escalated and accepted tasks can all be grouped under the Tasks category.

To define categories:

1. In the Customer Profile Setup window, navigate to the Preferences tab.

2. In the Categories region, enter a name for the category in the Category field.

3. Enter a meaning for the category in the Meaning field.

4. Optionally enter a description for the category in the Description field.

5. Save your work.

4.1.9.3 Associating Profiles with Modules

The Preferences tab may be used to override the default preferences for the customer profile. In the Module Groups section, you select modules to be associated with the customer type and dashboard/profile group. For example, Contact Center module may be associated with Organization and a profile group.

There are four modules which integrate with Citizen Profiles. Dashboard groups may be associated with the module called Customer Dashboard. Profile groups may be associated with the modules called Contact Center, Enter Service Request and E-Business Center.

To associate profiles with modules:

1. In the Customer Profile Setup window, navigate to the Preferences tab.

2. Select a module from the Module list of values to associate with a citizen type. Although all modules appear in the list of values, you must select Customer Dashboard, Contact Center, Enter Service Request, or E-Business Center.

3. Select a customer type. The choices are All, Person and Organization.

4. Select or enter a profile group or dashboard group to be associated with this module.

5. Save your work.

4.1.10 Running the Customer Profile Engine

The Customer Profile Engine is a server side PL/SQL concurrent program. You must run the Customer Profile Engine after completing the customer profile setup process so that all the SQL statements defined during the setup are executed to generate the appropriate profile values. The Customer Profile Engine, when executed, performs the following operations in the sequence below:

- Evaluates the results of all the effective profile variables.

- Evaluates the results of all effective profile checks based on the profile variables.

- Evaluates the results for all the customers and accounts.

The Customer Profile Engine can be run in two ways:

- As a concurrent program (for more information on running concurrent programs, refer to the *Oracle System Administrator's Guide*).

- By clicking the Refresh button available in the Profile section or the Dashboard tab of the Contact Center. The refresh will fetch the latest data for the customer selected in the Contact Center.

4.2 Setting up Relationship Plans

The Relationships Plan module of Oracle CIC is designed to enable your agency to automate the citizen service practices and to provide proactive and consistent care for all your citizens. You can create and execute different plans for different types of customers. Relationship plans can be configured to uniquely target each citizen. Execution of relationship plans improves real time responses to citizens' concerns. The following list presents the steps you must complete to set up relationship plans:

- Prerequisite Steps

    - Define Plan Groups (optional step)

    - Define Actions

    - Define Process Definitions for Outcomes

    - Define Messages

- Setting up Relationship Plans

    - Define Relationship Plans

    - Add or Modify Relationship Plan Condition Lines

    - Enable Relationship Plans

    - Run the Relationship Plan Assignment Engine

4.2.1 Defining Plan Groups

Plan groups help organize relationship plans into logical groups. Defining Plan Groups is an optional step for setting up relationship plans.

To define plan groups:

1. Navigate to the Relationship Plans Group Lookup window.

2. In the Details block, insert a new row by clicking the New toolbar button.

3. In the new row, enter the appropriate values for the Code, Meaning and Description fields. Leave the Tag field empty since it is not used in Oracle CIC.

4. Optionally enter the periods when this plan group will be effective by entering dates in the From and To fields.

5. Save your work.

4.2.2 Defining an Action

You must define an action before it can be used for defining condition lines for the relationship plan. Oracle CIC provides a predefined action which has one attribute called CUST_NAME. When you define a condition line for a relationship plan, you must ensure that each condition has a unique action attached to it. You can use the same attribute, CUST_NAME, for each action, if desired. If you decide to use an action with an attribute other than CUST_NAME, you must customize the code in the Action Assembler to accept the new attribute.

To define an action:

1. Navigate tot he Action window.

2. Enter a name for the action in the Name field.

3. Select Action Based in the Action Type field. Date Based is not supported for this release.

4. Optionally enter a description of your action in the Description field.

5. Enter a value in the Correlation field that begins with **CSC_**. This value correlates the action to Oracle CIC.

6. Select the Enabled and Allow Synchronous Outcomes check boxes. Only enabled actions can be used for defining conditions lines for relationship plans.

7. In the Basic tab, enter a name to describe the Element to be used in the action attribute.

8. CUST_NAME is the attribute that derives the customer name and is used as the Element Name in the Action. This attribute name must be used in the Process Definition and the Message Definition.

9. Optionally enter a description in the Description field.

10. Select a data type of CHAR, NUMBER, or DATE in the Data Type field.

11. Select a format mask, if appropriate.

12. Save your work.

4.2.3 Defining Process Definitions for Outcomes

Process definitions determine the outcomes which are utilized for setting conditions in the Conditions window. Note that the Parameter name used in the Process definition must be the same as the Element Name used in the related Action.

To define process definitions:

1. Navigate to the Process Definitions window.

2. Enter a name for the process in the Name field. If you are defining an Alert process, the name of the process must be the same as the Message Name.

3. Optionally enter a description in the Description field.

4. Select a value of Outcome in the Purpose field.

5. Select either Alert, Script, PLSQL or Workflow in the Type field. If you select Workflow, enter values for Workflow Name and Workflow Process. If you select PLSQL, enter values for Package and Procedure.

6. Optionally enter comments in the Comments field.

7. If you are defining a PLSQL or workflow process, select the Validate Name button to validate the name of the workflow process or the PLSQL package.

8. In the Parameters section, enter a value in the Name field. This value must be identical to the element name you used in your Action definition.

9. The Data Type defaults.

10. Optionally enter values in the Default Value and Description fields.

11. Save your process definition.

4.2.4 Defining Messages

Messages are defined for use in real-time alerts to citizens. The message definition is application specific; you must define messages for each applications.

To define messages:

1. Using Application Developer as your responsibility, navigate to the Messages window.

2. Enter a name for your message in the Name field. If you are defining a message to be used with an Alert process, the name of the message must be the same as the name of the alert process.

3. Select a language in the Language field.

4. Select Customer Care in the Application field.

5. Optionally enter the appropriate values in Number, Type, Maximum Length and Description fields.

6. In the Current Message Text field, enter the message that should appear as the real-time alert. If you want to use a token such as Customer Name in the message, the token name must be the same name as the parameter used in the process definition. The parameter is identical to the element name specified while defining the action.

7. Save your work.

4.2.5 Defining Relationship Plans

Actions, process definitions, and messages are integral components of relationship plans. Hence, these must be available before you start the process of defining relationship plans.

To define relationship plans:

1. Navigate to the New Plan window.

2. In the Plan Header tab, enter a name for the plan in the Name field.

3. Optionally select a group name from the Group Name list of values if you previously defined plan groups.

4. Optionally enter start and end dates for this relationship plan. These dates define the period when the relationship plan will be active.

5. Select the Account Level check box if you want to create a plan that is valid at the account level. If you do not select the Account Level check box, the plan is targeted at the party level. An example of the usage of an account level relationship plan would be the creation of a specific relationship plan for a citizen.

6. All relationship plans are initially created from a template. So select the Template check box in the Plan Type section. The Custom check box can be used only from the Inquiry tab when you customize a relationship plan for a specific citizen.

7. Enter a description of the Relationship Plan in the Description field.

8. In the Plan Criteria region, define the criteria to be used by the Relationship Plan Assignment Engine to determine associations between citizens and relationship plans. Select a profile check in the Profile Check field.

9. Select a logical operator in the Operator field. The choices are =, <, >, >=. <=, Between, and Not Between.

10. Enter a low value in the Low Value field.

11. Enter a high value if you selected an operator value of Between or Not Between in step 9.

12. Save your relationship plan.

13. Open the Plan Details tab.

14. Click the New Condition button to open the Condition window.

15. Enter the name of your condition in the Name field.

16. Optionally enter effective dates for your condition.

17. Optionally enter a description of your condition in the Description field.

18. Optionally enter comments about your condition in the Comments field.

19. In the Condition Type region, select the Action radio button. The Date condition type is not supported in relationship plans.

20. Select an action from the Action list of values. The list of values contains actions that you previously defined. You must use a unique action for every relationship plan. Only action attributes can be used to create condition lines.

21. Select the Evaluate Only Once check box if you want your condition to fire only once.

22. In the Outcomes region, select an outcome. Outcomes are defined as explained in the Defining Process Definitions for Outcomes section. Note that outcomes can be real time, such as alerts/scripts, or they can run in the background, such as tasks or workflow processes.

23. Select the Parameters button to open the Parameters window.

24. Select the appropriate parameter lines. Right-click to open the pop-up menu.

25. Choose the Populate selected rows in PARAMETERS option. The Parameters window opens.

26. Select an action attribute for each parameter from the Action Attribute list of values.

27. Select the OK button to return to the Condition Window.

28. Save the conditions and close the Conditions window.

29. Save your work from the New Plan window.

4.2.6 Adding or Modifying Relationship Plan Condition Lines

To add or modify condition lines on a relationship plan:

1. Navigate to the New Plan window.

2. Query up the relationship plan in which you want to modify or add condition lines. The name of the window changes to Modify Plan.

3. Open the Plan Details tab. This tabs presents details about the selected relationship plan. It also presents a tree structure containing various elements of the plan.

4. To add a condition to the plan header:

    a. Select the Add Condition button. The Add Condition window opens. This window lists all the conditions defined in the system.

    b. Select a condition line and then select the OK button to attach it to the plan header.

5. To modify a condition line on a relationship plan:

    a. Select the Modify Condition button from the Plan Details tab. The Condition window opens.

    b. Make the necessary changes to the condition line or outcome. Refer to Defining Relationship Plans for details on working in the Condition window.

    c. Save your changes and close the Conditions window.

6. Save your work.

4.2.7 Enabling Relationship Plans

Two windows are integrated with Relationship Plans - Contact Center and Enter Service Requests. These two windows are designed to execute the triggers that you enable in this step. The Contact Center window can use the On-Insert, On-Update and Custom1 triggers. The Custom1 trigger fires on queries. The Service Request window can use the On-Insert and On-Update triggers. If relationship plan triggering is not defined for these windows, the Relationship Plan Assignment Engine (a server side PL/SQL concurrent program) will ignore them. In such cases, you will not be able to use relationship plans.

To enable relationship plans:

1. Navigate to the Enable Relationship Plans - Setup window.

2. The Function LOV lists all available windows. However, relationship plans integrate only with the Contact Center and Enter Service Request windows. Select only the following functions in the Function field:

   - CSCCCCRC for Contact Center

   - CSXSRISR for Enter Service Request

   The user Function Name field displays the title of the window (for example, Enter Service Request).

3. There are four check boxes that help you define when you want the triggers in your relationship plan to fire. You can enable relationship plans on insert and/or on update. You can also use a predefined trigger called Custom1 to fire when a query is run in the Contact Center form.

4. Optionally enter the Start and End dates. These dates would identify the period when relationship plan is active for the selected windows.

5. Save your work.

4.2.8 Running the Relationship Plan Assignment Engine

The Relationship Plan Assignment Engine is a server side PL/SQL concurrent program. You must run it after completing the relationship plan setup process so that all associations between citizens and relationship plans are made. The Relationship Plan Assignment Engine performs the following operations:

- Evaluates all customers that meet relationship plan criteria and associates the customer with the appropriate relationship plan.

- Evaluates all customer that do not meet relationship plan criteria and disassociates the customer from the relationship plan.

- Checks for customers who have been manually assigned to relationship plans and ignores automatic association/disassociation rules for these customers.

For detailed information on running the Relationship Plan Assignment Engine, and other similar concurrent programs, please refer to the *Oracle Applications System Administrators Guide*.

5

Setting Up Tasks and Service Request

This chapter provides detailed implementation steps and instructions on setting up task and service request types for Oracle CIC. This section covers the following topics:

- Setting up Tasks

- Setting Up Service Requests

- Configuring Service Requests and Tasks

- Setting up Incident Address Flexfield

- Setting up Workflows

5.1 Setting up Tasks

5.1.1 Defining Task Types

Defining task types allows you to set predefined tasks types, which users can create using Oracle CIC. Oracle CIC is seeded with a number of task types. You can create task types suited to the specific needs of your agency, if so required. You can set up Oracle CIC so that the Task Type LOV would list only the task types you want the users to create.

To define task types:

1. Navigate to the Task Types window.

2. Click the New toolbar button to insert a new row for entering task type.

3. In the Type field, enter a name for the task type.

4. In the Workflow field, optionally select the workflow to be used for completing the task. If you select a workflow, the Task Workflow and Description fields towards the bottom of the window are automatically updated.

5. In the Rule field, select the rule that the task type should follow. This is a code that defines the action that should take place when this type of task is created.

6. Use the Effective Dates From and Effective Dates To fields to specify the period when the task type would be active. Setting the Effective Dates To value would obsolete the task type after the specified period.

7. In the UOM field, select the unit of measure for quantifying the effort for the task type.

8. In the Duration field, enter the default amount of time this task type would take to complete.

9. Select the Notification check box if the notification workflow is to be automatically launched when this task type is created.

10. Select the Schedulable check box if you want to reserve resources for the task when this task type is created.

11. Select the Private check box if you want to restrict task availability to the same responsibility level as the user who created it. For example, if the task type was defined by the CIC administrator, only the users who has the same responsibility as the CIC administrator would be allowed to create it.

12. Deselect the Seeded check box if you do not want users to edit this task type. By default, task types are created as seeded.

13. If you want to define resource requirements for the task type, perform the following steps. When you define resource requirements, you are actually identifying the type of resources that should be assigned to complete the current task type. Resource allocation will hinge on this procedure since only the type of resources identified here can be assigned to perform this type of task.

    a. Select the Resource Requirement button to open the Resource Requirements window.

    b. In the name field, select the resource type that needs to be assigned to perform the this task type.

    c. In the Required Units field, enter the estimated number of units of the selected resource type that would be required to perform this task type.

    d. Select the Enabled Flag check box to activate the resource type assignment for the task type.

    e. Select OK to save your assignments and return to the Task Types window.

14. Save your work.

Note: The seeded task type is:

- Dispatch for all Field Service-specific tasks.

- Email Notification for sending email.

5.1.2 Defining Task Status

You can limit the user's choices of task status by defining the list of status options and determining the employee type that has access to each status type. When you provide a list of values for the Task Status field, task creators choose from a pre-defined template of status options. Use this procedure to define types of task status for your users.

You can also define a group of tasks that must be performed and impose a sequence of statuses to the tasks. A status transition is the imposed sequence of statuses. For example, one status transition may dictate the following status sequence:

- Open

- Assigned

- Working

- Closed

As each status in the sequence is completed, the subsequent status appears on the agent's list.

In addition, you can define rules for each status transition. A status transition rule defines access and read-write privileges for the status transition. Rules can be associated to responsibilities, so that a manager may have more privileges than an agent.

To define task status:

1. Navigate to the Task and Escalation Status window.

2. Define a type name and enter it in the Status field.

3. Enter a brief description of the status type in the Description field.

4. Enter the effective dates in the From and To fields.

5. Select the appropriate task status check boxes. The following check boxes are available:

   - Task Status

   - Assignment Status

   - Assigned

   - Working

   - Schedulable

   - Accepted

   - Rejected

   - Onhold

   - Approved

   - Completed

   - Cancelled

   - Delete Allowed

   - Closed

   - Seeded

6. Optionally, define transition values that determine the user privilege for each status type.

   Use this procedure to define transition values.

   a. Click Define Transition.

      The Status Transition window opens.

    b. In the Rules tab, enter a name for the user privilege relationship in the Rule Name field.

    c. Enter an initial and final status type for the user.

       Use the initial and final status values to determine the user's range for selecting task status.

    d. In the Responsibility tab, enter the pre-determined rule name.

    e. Enter a user type in Responsibility Name field and click OK.

       A transition value stipulating user status privilege now exists.

    f. Save your task status type.

       The new task status and corresponding privileges register as lists of values for their fields in the application.

5.1.3 Defining Priority

Determine task priority by choosing terms for varying levels of priority and setting an importance rating that corresponds with each term.

To determine task priority for your users:

1. In the Tasks window, click Navigator on the Task toolbar.

2. In the Task Manager Navigator, double-click Setup to expand the node.

3. Select Task Priority and click OK.

   The Task Priority window opens.

4. Define a name and enter it in the Priority field.

5. Enter a numerical value in the Importance field.

   Choose an importance value from a larger defined scale of priority.

6. Enter a brief description of the priority value.

7. Enter the effective dates in the From and To fields.

8. Select Seeded to restrict the edit of task priority from future users.

9. Save your task type.

   The new task priority registers as a lists of value for the Priority field in the application.

5.1.4 Defining Task Type Attributes

Use the CUG Task Type Attributes Lookups window to define new attributes, or modify existing attributes for pre-defined task types. For the seeded task type Email Notification, Oracle CIC provides the following seeded attributes.

- Approver
- Subject
- Message Body
- Requester
- Comments
- Message Header
- Message Footer
- Email Reminder Counter
- UOM for Due Date
- Offset for Due Date

> **Notes:** Approver and Requester task type attribute values must reflect the Oracle Application user name defined in your system. Oracle CIC will use the email address entered while defining the Oracle Application user name of the Approver and Requester.

To define task type attributes:

1. Navigate to the CUG Task Type Attributes Lookups window. CUG_TASK_TYPE_ATTRIBUTES lookup type opens by default.

2. Click the New toolbar button to open a new row.

3. In the new row you have opened:

    a. In the Code field, enter the lookup code you want to create. The code is internal to the system.

    b. In the Meaning field, explain the meaning of the lookup code. This is the user facing value of the code, and is displayed in all LOVs from which this code can be selected.

    c. Optionally enter a description and the effective dates in the appropriate fields.

4. Repeat steps 3 to create additional lookup codes.

5. Save your work.

5.1.5 Defining Task Attribute Values

Attribute values (appearing in the LOVs) can be set up at the application level so that you can use them across Oracle CIC configuration windows.

To define list of values:

1. Navigate to the Application Object Library Lookups window.

2. In the Type field, enter a name for the value list.

3. In the User Name field, enter a user friendly name for the value list.

4. In the Application field, select Oracle Citizen Interaction Center. Note that the lookups are created relative to an application.

5. In the Description field, optionally enter a description for the list you are creating.

6. Click in the spread table below the control region. The first row of the spread table opens.

7. In the open row:

   a. In the Code field, enter a code indicating a value that need to be displayed in the appropriate LOV. Note that this code is internal to the system.

   b. In the Meaning field, explain the meaning of the code. This is the user facing value of the code, and is displayed in all LOVs from which this code can be selected.

   c. Enter a description and the effective dates in the appropriate fields.

   d. Optionally enter the effective dates.

8. Repeat step 7 to define all the values you want to for this list.

9. Save your work.

5.1.6 Capturing Task Type Attribute Configuration Details

Use the Task Type Attributes Configuration window to define the relationship between task types and task attributes. These attributes will appear as the optional attributes while associating the task with a service request type.

To capturing task type attribute configuration details:

1. Navigate to the Task Type Attributes Configuration window.

2. In the Name field in the Task Type region, select the task for which attributes are being captured.

3. In the Name field in the Task Type Attributes region Type field, select an attribute you want to assign to the task type. The process for defining these attributes is explained in the section titled "Defining Task Type Attributes".

4. In the List Name field, optionally select a list value defined for the attribute you have selected. The process for creating these values is explained in the section titled "Defining Task Attribute Values".

5. Optionally enter the default value that Oracle CIC should display for the task.

6. Remove the selection from the Mandatory check box if entering this value during run time is to be made optional. This check box is selected by default.

7. Remove the selection from the Displayed check box if you do not want to display this attribute during run time. This check box is selected by default.

8. Repeat steps 8-13 to define additional values.

9. Save your work.

5.2 Setting up Service Requests

This section discusses the procedures you must follow for setting up service requests.

5.2.1 Defining Service Request Attributes

Oracle CIC provides the seeded lookup type CUG_SR_TYPE_ATTRIBUTES. To use this lookup type, you must create lookup codes (values) that reflect your particular service request attribute needs. You can then associate each of these lookup codes to lookup types as explained in the section titled "Defining Tasks and Service Request Attribute Values".

To define service request attributes:

1. Navigate to the CUG_SR_TYPE_ATTRIBUTES window. CUG_SR_TYPE_ATTRIBUTES lookup type opens by default.

2. Click the New toolbar button to open a new row.

3. In the new row you have opened:

   a. In the Code field, enter the lookup code you want to create. The code is internal to the system.

   b. In the Meaning field, explain the meaning of the lookup code. This is the user facing value of the code, and is displayed in all LOVs from which this code can be selected.

   c. Optionally enter a description and the effective dates in the appropriate field.

4. Repeat steps 3 to create additional lookup codes.

5. Save your work.

5.2.2 Defining Service Request Attribute Values

Attribute values (appearing in the LOVs) can be set up at the application level so that you can use them across Oracle CIC configuration windows.

To define list of values:

1. Navigate to the Application Object Library Lookups window.

2. In the Type field, enter a name for the value list.

3. In the User Name field, enter a user friendly name for the value list.

4. In the Application field, select Oracle Citizen Interaction Center. Note that the lookups are created relative to an application.

5. In the Description field, optionally enter a description for the list you are creating.

6. Click in the spread table below the control region. The first row of the spread table opens.

7. In the open row:

   a. In the Code field, enter a code indicating a value that need to be displayed in the appropriate LOV. Note that this code is internal to the system.

   b. In the Meaning field, explain the meaning of the code. This is the user facing value of the code, and is displayed in all LOVs from which this code can be selected.

       c. Enter a description and the effective dates in the appropriate fields.

       d. Optionally enter the effective dates.

8. Repeat step 7 to define all the values you want to for this list.

9. Save your work.

5.2.3 Defining Service Request Statuses

You can define service request statuses to indicate the current state of reported service requests. For example, a citizen calls to report an abandoned vehicle. You could set the service request status to Open.

You can set up status transition rules and associate a rule with a user responsibility so that a service request progresses from one status to another as per the predefined status transition rule.

To Setup Service Request Statuses:

1. Navigate to the Service Request Statuses window. This window lists all the predefined service request statuses. Seeded statuses can be identified by the selection in the Pre-Defined check box.

2. Click the New toolbar button to open a blank row.

3. Enter a name for the service request status in the Status field.

4. If the status is to indicate that the service request is closed, then select the closed check box. You can have multiple statuses indicating that the service request is closed. For example, a service request can be closed when it is cancelled or completed. In this situation, both the statuses will have the Closed check box selected.

5. If you want to define the status for a limited period, use the Start Date and End Date fields to set the period.

6. If you want to specify a color for displaying the status name, select a color in the Text Color field.

7. Enter a brief description of the status in the Description field.

8. Optionally, check the Service Request Status Restriction check boxes as per the business rules of your organization. Refer to the following table for explanation of status restrictions:

Check box	Restriction associated with the status
Disallow Request Update	Users cannot update an existing service request. Only the service request status field can be updated.
Disallow Task Update	Users cannot update an existing task.
Disallow Charge Update	Users cannot update existing charges.
Disallow Owner Update	Users cannot change the owner of the service request.
Disallow Product Update	Users cannot update the selected product on a service request.
Disallow Charge	Users cannot create a charge line.

9. If you want to define transition for statuses, select the Transitions button. The Status Transition window opens.

   Transition determines the progress of a service request through the various statuses as defined in the user privilege for each status type. In the Rules tab, the source defaults to Request Transition.

10. In the Application field, select Oracle Citizen Interaction Center. This is the application which would use the transition rule being defined.

11. In the Rule Name field, enter a name for the rule. The transition state you define becomes the rule attached to this rule name when you save your work after entering transition states (see next step).

12. Select from the list of values in the Current State and Next State fields. Use these fields to define the transition statuses. You may need to select Current State and Next State values in multiple rows to create a complete rule. If your rule comprises multiple rows, make sure that the Next State value in the first row is selected as the Current State Value in the second row, and so on. This would ensure a smooth transition between statuses.

13. On the Responsibility tab, select a responsibility from the Responsibility field. The transition would work only for this responsibility.

14. Select the rule in the Rule Name field. The rule is defined on the Rule tab. The rule name and the associated transition states constitute the rule. All previously defined rule are available for assignment.

15. Click OK to save your work and return to the Service Request Statuses window.

16. Save your work.

5.2.4 Defining Service Request Types

Service request types help categorize your service requests. For each service request type, you can set up service request status. These statuses will then be inherited by all the service requests belonging to the service request type you are defining. Note that the service request status must be defined before you can assign it to a service request type.

Each type can be linked to an existing Oracle Workflow process. The workflow can be automatically launched when the service request is created (not when it is updated) or manually launched depending on the settings you enter while defining service request types. Following are some examples of service request types that you can create:

- Abandoned Vehicle

- Appliance Removal

- Street Light Repair

The new service request type and related statuses register as entries in the lists of values for their fields in Service Requests window.

To setup service request types:

1. Navigate to Service Request Types window. This window lists all the existing service request types.

2. Click the New toolbar button to create a blank row for defining the service request type.

3. In the Type field, enter a name for the service request type.

4. In the Business Process field, select the business process for which this service request type is being created. A business process is an application module of Oracle CIC such as Field Service and Customer Support.

5. Enter the effective dates for the service request type in the Start Date and End Date fields.

6. Enter a brief description of the request type in the Description field.

7. In the Workflow field, select the CIC Generic Workflow workflow. Do not select the Auto Launch Workflow check box, if this workflow is selected.

8. Optionally, select from the available check boxes. Refer to the following table for details of the actions initiated when the check boxes are selected.

Check box	Action
Auto Launch Workflow	Launches workflow automatically when the service request is saved. Not to be used with Oracle CIC Generic Workflow.
Abort Workflow on Close	Aborts workflow when service request status is set to closed
Web Entry	Makes this service request type be accessible to web entry through *i*Support

9. Select the Related Statuses button to define the status options for the current service request type. The Related Statuses window opens. The statuses you select from this window would be available as the valid statuses for the service requests belonging to this service request type.

10. Select the appropriate status in the Status field. The description associated with the selected status appears in the Description field.

11. Enter the effective dates in the Start Date and End Date fields.

12. Repeat steps 10 and 11 to specify more statuses, if needed.

13. Select the OK button to save your work and return to the Service Request Types window.

14. Save your work.

5.2.5 Defining Service Request Severities

You can define different severity levels for the service requests created by your agency. Severity levels can be Low, Medium, High, etc. Severity helps set the priority for resolving the service request.

The severity levels you define will be available as values in an LOV. While creating a service request, the CSR selects an entry from this LOV to set the severity level of the reported problem. Service Request severities reflect the CSR's perception of the urgency of the problem.

To define service request severity levels:

1. Navigate to Service Request Severities window.

2. Click the New toolbar button to create a blank row for defining service request severity.

3. In the Severity field, enter a label for the severity level you are defining.

4. Enter a numerical value in the Importance Level field. The importance level indicates the importance of this particular severity level with respect to other existing severity levels.

5. Enter a brief description of the severity level in the Description field.

6. Optionally set the effective dates using the Start Date and End Date fields.

7. Select a text color for the severity level. This is the color in which the label for the severity level (for example, High) will be displayed in the Service Request window.

8. Save your work.

> **Note:** The Defect Severity field is irrelevant in Oracle CIC context.

5.2.6 Defining Service Request Urgencies

A service request urgency reflects the citizen's perception of the problem for which a service request is being created. You can define a set of urgencies so as to capture the citizen's perception of the problem in a uniform manner. The urgency levels you define in this step will be available in the appropriate LOV while creating a service request.

To define service request urgency:

1. Navigate to the Service Request Urgencies window.

2. Click the New toolbar button to create a blank row for defining service request urgency.

3. In the Urgency field, enter a label for the urgency level you are defining.

4. Enter a numerical value in the Importance Level field.The importance level indicates the importance of this particular urgency with respect to other urgency levels.

5. Enter a brief description of the urgency level in the Description field.

6. Optionally set the effective dates using the Start Date and End Date fields.

7. Select a text color for the urgency level. This is the color in which the label for the urgency level (for example, High) will be displayed in the Service Request window.

8. Save your work.

5.2.7 Defining Service Request Problem Codes

A problem code gives meaning to the subject of the service request as described by the citizen. Problem codes isolate the detailed reason for the request. For example, assume that AR (Appliance Removal) is a valid problem code in Oracle CIC. When a citizen reports that she has an old appliance for pick up, the CSR would assign AR as the problem code in the service request.

When you define service request problem codes, you are actually creating the values that would be listed in the LOV attached to the Problem Code field.

To define problem codes:

1. Navigate to the Service Request Problem Codes lookup window.

   The header region of this window displays information such as problem code type, name, application for which the problem code type is defined and description. All the existing problem codes for the problem code type displayed in the header region are listed in the spread-table.

2. Click anywhere in the spread table. Now click the New toolbar button to create a blank row for defining a new service request problem code.

3. In the Code field, enter a label for the problem code you are defining. A problem code is a brief representation of the problem. You can use a cryptic code (for example AR for appliance removal) or a more meaningful and user-friendly code (for example, APPLIANCE for appliance removal).

4. In the Meaning field, enter the meaning of the problem code.

5. In the Description field, describe the problem code.

6. Optionally set the effective dates using the From and To fields.

7. Select the Enabled check box to make the code available for use. Only the enabled codes would be listed on the LOV.

8. Save your work.

5.2.8 Defining Service Request Resolution Codes

A service request resolution code specifies a code indicating how the service request can be resolved. A resolution code gives meaning to the step(s) needed to be performed to solve the issue for which the service request was created. Resolution codes isolate the course of action for solving the issue. For example, assume that a service request for appliance removal was created on a citizen's behalf. In this case,

a resolution code (for example, pick up) can be assigned since appliance pick up would solve the problem.

When you define a service request resolution code, you are actually creating the values that would be listed in the LOV attached to the Resolution Code field.

To define a service request resolution code:

1. Navigate to the REQUEST_RESOLUTION_CODE Lookups window.

    The header region of this window displays information such as resolution code type, name, application for which the resolution code type is defined and description. All the existing resolution codes for the resolution code type displayed in the header region are listed in the spread table.

2. Click anywhere in the spread table. Now click the New toolbar button to create a blank row for defining a new service request resolution code.

3. In the Code field, enter a label for the resolution code you are defining. A resolution code is a brief representation of the solution. You can use a cryptic code (for example AP for appliance pickup) or a more meaningful and user-friendly code (for example, APPLIANCE for appliance pickup).

4. In the Meaning field, enter the meaning of the resolution code.

5. In the Description field, describe the resolution code.

6. Optionally set the effective dates using the From and To fields.

7. Select the Enabled check box to make the code available for use. Only the enabled codes would be listed on the LOV.

8. Save your work.

5.2.9 Defining Service Request Type Attributes

This section explains how to establish the relationship between service request types and service request attributes.

When creating a service request based on a citizen interaction, the CSR needs to capture relevant information by posing a set of questions. These questions are normally based on the specific attribute type that need to be captured for a service request. In this context, service request type attribute may be defined as a characteristic of the service request type. All the attributes together define the service request type. For example, a citizen calls in to report an abandoned vehicle. The attributes that can be captured in this scenario includes the make of the car. For

each attribute, you can capture details. In our example, the details may include, the model of the car and its color.

Use the Service Request Attribute Configuration window to set the attributes and the attribute values that need to be captured for a service request type.

To define service request type attributes:

1. Navigate to the Service Request Attribute Configuration window.

2. In the type field, select the service request type for which attributes are to be defined. The description of the service request appears in the Short Desc field.

3. In the Responsible Party field, select the employee who owns the service request type you selected in the preceding step.

4. Verify the selection in the check boxes. Note that all these check boxes are selected by default.

   a. Select the Show Primary Address check box if you want to display the primary, active address of the customer in the incident address capture windows at run time.

   b. Select the Validate Incident Address check box if you want to validate the incident address for all instances of this service request type at run time.

   c. Select the Address Mandatory check box if you want to capture the incident address details at run time.

5. Retain the selection in the Check Required check box if you want Oracle CIC to check for duplicate service requests belonging to the current type. This selection will determine if the service request workflow, during runtime, will check if the submitted service request qualifies as a duplicate.

6. In the Time Frame field, enter the unit of time that defines the period for which duplicate checking is to be performed.

7. In the Increment Type field, select the unit of measure that quantifies the value you entered in the Time Frame field. These two fields together determine the time period for which duplicate checking is to be done.

   The Service Request Attributes region is used to capture the actual attribute details for the selected service request type. In addition to the attribute details, this region is also used to identify the service request attributes that will be used by the runtime workflow to check for duplicates.

8. In the name field, select an attribute you have defined under the CUG_SR_TYPE_ATTRIBUTES lookup type. Refer to the topic titled "Defining Service Request Attributes" for details on creating attributes.

9. In the List Name field, select a value list you have defined for assigning service request attribute values. For details on defining the value list, please refer the topic titled "Defining Service Request Attribute Values".

10. In the Default Value field enter the default value that should be displayed in the appropriate field at run time. This should be a value from the value list you have selected in step 9.

11. Select the Duplicate check box if you want duplicate checking to be enabled based on the values you have selected.

12. Remove the selection from the Mandatory check box if entering this value during run time is to be made optional. This check box is selected by default.

13. Remove the selection from the Displayed check box if you do not want to display this attribute during run time. This check box is selected by default.

14. Repeat steps 8-13 to define additional values.

15. Save your work.

5.3 Configuring Service Requests and Tasks

This section explains how to setup the relationship between the service request types and tasks you have created using the instructions in the preceding sections.

5.3.1 Setting up Service Request Task Type Attributes

During this process, you will identify the task types for a given service request type. While creating a task for fulfilling a service request, Oracle CIC would allow only the task types identified by the settings specified in this configuration process.

Use the Service Request - Task Type Attribute Configuration window to specify the task types that can be created for service request types. Before opening this window, Oracle CIC presents you a Find window from which you must select the service request type for which you want to define task types.

> **Note:** Oracle CIC is preseeded with the values to support the resolution of three task types. You can add additional task types. In such cases, you should also provide the resolution for the task types you have added.

To configure service request task attributes:

1. Navigate to the Service Request - Task Type Attribute Configuration window by selecting the appropriate service request type from the find window.

   The service request type you have selected is indicated in the Type field on the Use the Service Request - Task Type Attribute Configuration window. Description, if any, of the service request type is also displayed.

   The Service Requests Attributes section is used to identify the service request type attribute and its values that will trigger a task type's execution during runtime. You can select the attribute from a list f values.

2. In the Task Type field, select the task type you want to associate with the service request.

   > **Note:** Select "Dispatch" as the task types for all Field Service-specific tasks.

3. In the Name field, optionally select a service request attribute you have associated with the current service request type.

4. In the Value field, optionally select a value list you defined for assigning task attribute values. For details on defining the value list, please refer the section titled "Defining Tasks and Service Request Attribute Values".

   You need not select values in the Name and Value fields. If you select values in these fields, they will be used to create a logical condition based on which the task type will be created. For example, if the Task Type is Telephone Repair, Name is Brand, and Value is XYZ, Oracle CIC will allow the creation of the task type (Telephone Repair) only if the brand of the instrument is XYZ.

5. Specify the effective dates if you want to limit this definition to a specific period of time.

The Mandatory tab consists of fields which are used for creating tasks belonging to the task type selected in step 2. Note that the data entered on this tab is specific to each row in the Service Request Attributes region.

6. In the Task Name field, enter a user friendly name for the task that is to be created for the current task type.

7. In the Description field, describe the task that will be created for the current task type.

8. In the Priority field, select the priority for executing this task.

9. In the Status field, select the default status to be assigned to the task when it is created.

Note: Select task status "In Planning" for all Field Service-specific tasks.

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10. Select either Private or Publish check box. Select the Publish check box if you want to allow task notification to all users. Select Private check box if you want to allow task notification only to the task owners.

11. In the Owner Type field, select the default resource type that will own this task.

12. In the Owner field, select the specific resource who will be defaulted as the owner of this task.

13. In the Assignee Type field, select the default resource type for performing this task.

14. In the Assignee field, select the specific resource to whom this task will be assigned by default.

    The Optional tab lists the attributes associated with the task type you have defined using the procedures presented in the section titled "Setting up Task Type Attribute Capture Configuration".

    defined in consists of Name and Value fields for Task Type Attributes. By default, the mandatory user defined attributes are queried when this tab is opened.

15. Save your work.

16. Repeat steps 2 - 15 for each task type you want to associate with the current service request type.

5.4 Setting up Incident Address Flexfield

Incident addresses are used in identifying duplicate service requests. It is recommended that the address style configured for capturing incident address be flexible to flag and compare addresses in the same area.

Incident address is defined by the following flexfield:

Application: Oracle Receivables

Flexfield Name: Address

For details on working with flexfields, please refer to the *Oracle Applications Flexfields Guide*.

> **Note:** Please refer to Appendix A: Oracle CIC Public APIs for information on integrating Oracle CIC with external spatial applications for validating incident address.

5.5 Setting up Workflows

Oracle CIC uses the following workflows. For detailed information on workflows, please refer to Oracle Workflows documentation.

- Generic Workflow for the Citizen Interaction Center
- CIC Email Workflow

5.5.1 CIC Generic Workflow

The Citizen's Interaction Center offers a single, highly generic workflow that is reused for all it's service request types. The following sections discuss the key workflow processes:

1. The workflow starts by querying the base service request table to get pertinent information on the service request. The workflow checks if the Override Address Validation flag has been set. This activity has to be extended if you want to add processing logic if the Override Address Validation flag is set.

2. The workflow replaces the current service request owner with the service request owner captured during configuration time.

3. The workflow checks if duplicate check needs to be performed.

   a. If Yes, the workflow checks if the submitted service request is a potential duplicate.

   b. If the service request is a potential duplicate, the workflow sends a notification to the service request owner.

   c. If the service request owner determines that the service request is a duplicate, the workflow updates the service request with the parent service request information (in the Related field) and closes it.

   d. If the service request owner determines that the service request is not a duplicate, the workflow will continue to the resolution stage.

4. The workflow creates all the tasks associated with this service request type based on the task details captured during the implementation stage.

5. When all the tasks are successfully completed, the workflow sets the service request status to Closed.

To setup CIC Generic workflow:

1. Using the Workflow Builder, select the following workflow item types from the database:

   - Service Request

   - Citizen Interaction Center - Generic Workflow

2. Copy the process Generic Workflow For The Citizen Interaction Center into Service Request item type.

3. Copy all the attributes, notifications, functions, Messages, and Lookup Types from the Citizen Interaction Center - Generic Workflow item into the respective workflow components within Service Request item type.

4. Save the Service Request item type into the database.

5. Log on to Oracle CIC as CIC Administrator.

6. Navigate to Service Request Types window.

    a. Define a service request type or select an existing service request type.

    b. In the Workflow field, select Generic Workflow for the Citizen Interaction Center.

    c. Verify that the Autolaunch Workflow check box is not selected.

7. Save your work.

5.5.2 CIC Email Workflow

Oracle CIC provides a seeded task workflow for task type Email. This workflow is spawned by the Generic CIC workflow. The following sections discuss the key workflow processes:

1. The Generic CIC Workflow initiates the Email workflow.

2. The workflow gets the service request details, which includes all the task attribute details (sender, requester, approver, subject, etc.) for the task Email Notification. It also collects the service request attributes and creates the email message body.

3. The workflow sets a due date for the concerned authority to acknowledge the email notification. The due date is set based on the service request date and the email task attributes.

4. The workflow sends an email notification to the concerned authority for appropriate action.

    If the concerned authority does not acknowledge the message within the due date, the workflow sends a reminder notification (if configured as one of the task attributes). If the concerned authority acknowledges any of the notifications (the original or a reminder), the workflow terminates.

    If the concerned authority does not respond, the workflow sends the maximum number of reminders (set as a task attribute). The work flow then fails and terminates.

5. When the processing is competed successfully, the workflow updates the task status to Completed. If the processing failed, the workflow sets the task status to Cancelled. The task status is determined by the following profiles:

    - CUG_TASK_FAILED_STATUS

    - CUG_TASK_SUCCESS_STATUS

To setup CIC Email workflow:

1. Using the Workflow Builder, select the following workflow item types from the database:

   - Workflow For Task Manage

   - Email Notification Generic

2. Copy the process Email Notification Generic into the respective component under item type Service Request.

3. Copy all the attributes, notifications, functions, Messages and Lookup Types from Email Notification Generic item type into respective components within Service Request item type.

4. Save Workflow for Task Manager item type into the database.

5. Log on to the Oracle CIC and assume the Citizen Interaction Center responsibility.

6. Navigate to Task Types window.

   a. Select task type Email.

   b. In the Workflow field, select Email Notification Generic.

7. Save your work.

6

Implementing CIC Self-Service

This chapter provides detailed implementation steps and instructions on how to implement the Oracle CIC Self-service. This chapter discusses the setting up of Knowledge Management, the Marketing Encyclopedia, and the Homepage. This chapter comprises the following topics:

- Users and User Management
- Setting up Knowledge Management
- Setting up the Marketing Encyclopedia System
- Setting up Forums
- Setting up Citizen Homepage

6.1 Users and User Management

This section details how to access Oracle CIC. It also discusses user management issues.

6.1.1 Login Interfaces

There are two types of login interfaces within Oracle applications - the Oracle Applications Forms login, common to all Oracle applications, and the HTML JTF login screen. The Forms-based applications utilize Oracle Developer 2000, while the HTML applications present the JTF interface to the customer.

In Oracle Applications Forms, the System Administrator controls a variety of parameters relating to web component of Oracle CIC.

The JTF console is where citizens log in to access Oracle CIC. The menus that appear after login depend upon the roles and responsibilities assigned to the log in parameters assigned to the citizen. Citizens will not be able to access Oracle CIC functionality until they have been assigned both roles and responsibilities.

6.1.2 Roles, Responsibilities, and Permissions

During the implementation process and throughout the lifespan of Oracle CIC, it will be necessary for an administrator (*i*Support Administrator since Oracle CIC utilizes the *i*Support interface) to assign roles, responsibilities, and permissions to users.

> **Note:** All roles and responsibilities associated with Oracle CIC uses the prefix IBU.

A **role** is a collection of page and function level permissions that are granted to maintain application security. A *permission* is the smallest unit making up a role. There are two types of permissions - Functional and Data Access Control (DAC). Permissions dictate the actions that a user can perform.

Responsibilities control the presentation of menus, tabs, and screens. For example, the responsibility IBU_SYS_ADMIN gives administration users a different set of menus than the responsibility IBU_NORMAL_USER given to citizens.

The following table presents the seeded roles available in Oracle CIC Self-Service:

Role	Description
IBU_REG_USER	Oracle *i*Support regular user role: normal user functions
IBU_USER_MANAGEMENT	Oracle *i*Support primary user role: normal user functions and in addition can create and approve new users
IBU_SYS_ADMIN	Oracle *i*Support System Administrator role: sysadmin for iSupport role
IBU_EMPLOYEE	Reserved for future release.
IBU_GUEST_USER	Reserved for future release.
IBU_MANAGER	Reserved for future release.
IBU_SELF	Reserved for future release.

IBU_NORMAL_USER is the seeded responsibility to be assigned to all citizens who use Oracle CIC Self-Service.

The following table lists the roles and responsibilities by user type:

User Type	Role	Responsibility
Regular User	IBU_REG_USER	IBU_NORMAL_USER
Primary User	IBU_REG_USER	IBU_NORMAL_USER
	IBU_USER_MANAGEMENT	
Oracle CIC Self-Service Administrator	IBU_SYS_ADMIN	IBU_NORMAL_USER
	IBU_REG_USER	
	IBU_USER_MANAGEMENT	

6.1.3 Types of Users

Oracle CIC Self-Service users may be categorized into various user types relating to the application functionality that they will access. Oracle CIC Self-Service is preseeded with a System Administrator login (*i*Supportadmin) for performing Oracle CIC Self-Service related administrative tasks.

The following two user types must be set up for Oracle CIC Self-Service:

- Oracle CIC Self-Service Administrator
- Oracle CIC Self-Service Regular User

6.1.3.1 Oracle CIC Self-Service Administrator

You will use the System Administrator login to set up the Oracle *i*Support Administrator. The Oracle CIC Self-Service Administrator performs routine but high-level administrative tasks, such as:

- Assigning roles and responsibilities to citizens
- Setting up the homepage layout and content
- Setting up Knowledge Management and MES
- Setting up Forums and Usergroups

6.1.3.2 Regular User

This user type covers all citizens who will access and use Oracle CIC Self-Service. There are two types of regular users: End User and Business User. End Users would use Oracle CIC Self-Service for addressing personal issues with your agency. Business users may constitute citizens dealing with your agency on behalf of an organization.

6.1.3.3 Knowledge Management Admin User

This user performs Knowledge Management and MES setup and management.

6.1.3.4 Primary User

This is a super user who can approve other users, essentially supporting the *i*Support Administrator in approving new users and resetting passwords.

6.1.4 Creating Users

A user refers to any person who needs access to Oracle CIC Self-Service. This includes citizens, employees, partners and suppliers.

The procedures for creating users for Oracle CIC Self-Service (*i*Support) are discussed in this section. While you can create a number of user types, the basic procedures for defining them remain identical. The roles and responsibilities assigned to each user type may be different.

Creating users involves the following tasks:

- Registering users
- Approving the user, if needed
- Associating roles
- Associating responsibilities to the user
- Verifying user setup

6.1.4.1 Registering a User

Citizens would typically self register to access Oracle CIC Self-Service. You would need to register all employees who need to access Oracle CIC Self-Service. If the employees already have Oracle Applications (forms) login access, they can be assigned appropriate roles to access and use Oracle CIC Self-Service.

To register a user:

1. Access the JTF Login page.

2. Select the Register Here link.

3. The User Registration page opens. From this page select a user type: Business User, Individual User, or Primary User by selecting the appropriate radio button.

   Select Business User, if you are registering on behalf of an organization. Select Individual User if you are registering as a citizen to access the services provided by the agency. Select Primary User if you are the primary point of contact for an organization.

4. Select the Next button.

   If you are registering a business user, a page where you must enter a company id to identify your company appears. The company id is the same as your company's account number. Enter the Company Id and select the Submit button to proceed.

5. Fill in the mandatory information (first name, last name, user name, password and email id) in the appropriate fields. Make a note of the user name and password.

6. Select the Submit button. The Available Enrollments page opens. Select iSupport check box in this page.

7. Select the Next button. An acknowledgement page opens. Select the Continue button to return to the log on page.

   If you are registering as a business or primary user, the information you submitted goes into the System Administrator's queue. You will need to be approved before you can log on to Oracle CIC Self-Service. Individual users are automatically approved without the System Administrator's intervention.

6.1.4.2 Approving Users

All business and primary users must be approved by the Administrator before they can access Oracle CIC Self-Service. Individual users do not need to be approved for accessing Oracle CIC Self-Service.

To approve users:

1. Log on to Oracle CIC Self-Service as the System Administrator.

2. Open the Registration tab. Pending Requests that require approval are listed on the Approval page, which opens by default.

3. From the list of pending requests, select the user you want to approve.

4. In the Request Details screen, select Accept User. Note that a new account is created automatically when you accept the user.

5. Enter any comments in the Accept User Comments box and select Submit.

6.1.4.3 Assigning User Roles

A role is a collection of page and function level permissions that are granted to maintain application security. A permission is the smallest unit making up a role. There are two types of permissions - Functional and Data Access Control (DAC). Permissions dictate exactly which actions the user can perform.

To associate roles:

1. Log on to the JTF login page as the System Administrator.

2. From the list of users, select the user (in our example, Oracle CIC Self-Service Admin) you have just created. The User Details page appears.

3. Select Roles to open the User-Role Mapping window.

4. Select, the appropriate role(s) for the user. The available roles are as follows:

    Oracle CIC Self-Service

    - IBU_REG_USER: Oracle CIC Self-Service regular user role

    - IBU_USER_MANAGEMENT: Oracle CIC Self-Service primary user role

    - IBU_SYS_ADMIN: Oracle CIC Self-Service System Administrator role

    Knowledge Management/MES

    - CS_SYSTEM_ADMIN: Knowledge Management Administrator role

    - CS_SUPPORT_AGENT: Knowledge Management user role (create and view)

    - CS_KNOWLEDGE_WORKER: Knowledge Management user role (create, view, modify, and delete)

5. Select Update.

6.1.4.4 Assigning Responsibilities

Responsibilities control the presentation of menus, tabs, and screens. For example, the responsibility IBU_SYS_ADMIN gives access to a different set of menus as compared to the access granted by IBU_NORMAL_USER responsibility.

To associate responsibilities to a user from Oracle Applications:

1. Navigate to the Users window in Oracle Applications (Forms).

2. Query up the user to whom responsibility is to be assigned.

3. Assign the IBU_NORMAL_USER responsibility for Oracle CIC Self-Service user.

   Assign the CS_SYSTEM_ADMIN responsibility for Knowledge Base user.

4. Save your work.

6.1.4.5 Checking System Profiles

Ensure that the following profile values are set for the user for Oracle CIC Self-Service and Knowledge Management.

Responsibility	Profile Name	Value
Oracle CIC Self-Service Administrator	JTF_PROFILE_DEFAULT_APPLICATION	672
	JTF_PROFILE_DEFAULT_RESPONSIBILITY	52546
Knowledge Management Administrator	JTF_PROFILE_DEFAULT_APPLICATION	170
	JTF_PROFILE_DEFAULT_RESPONSIBILITY	21782
CRM HTML Administrator	JTF_PROFILE_DEFAULT_APPLICATION	690
	JTF_PROFILE_DEFAULT_RESPONSIBILITY	21841

6.2 Setting up Knowledge Management

The Knowledge Management module embedded in Oracle CIC leverages the Oracle InterMedia to help citizens and CSRs to search for solutions to known problems. It can also be used to search for documents such as white papers, user guides and FAQ's. Oracle CIC allows for the creation of new solutions using the SCA (Symptom, Cause, Action) architecture to expand the Knowledge Management

database to provide solutions to the problems encountered in day-to-day operations.

Citizens can search the online Knowledge Base to find answers to their questions instead of calling the a service center. Knowledge Base search organizes the search process so data is categorized in an easy and efficient manner. Using a natural language mechanism, citizens can enter a search statement in the form of a question, and the Knowledge Base returns solutions related to the statement. CSRs have access to the Knowledge Base to quickly find solutions to the issues facing the citizen.

Use the Knowledge Base Administration windows to set up the Knowledge Base for the Call Center component (for the CSRs) and the web interface (for citizens). Knowledge Base Administration allows you to create statement and solution types as well as search, create, and modify solutions.

6.2.1 Setting up Note Types for Knowledge Base Use

The integration of Knowledge Management module (which uses the concept of statements) with the Service Request module (which uses the concept of notes) requires that statements and notes be related to one another if they are to be used in both the modules.

In order for a note to be transferred to the Knowledge Base search, the note must be defined as a Knowledge Base note type. It is critical that both note and statement have identical name to make this happen. (The exception to this criterion is that all Knowledge Management note types must start with the prefix KB_.) In a Symptom/Cause/Action solution the note type for a symptom created in Knowledge Management would be KB_Symptom. The Service Request Note type and Knowledge Base note type would be Symptom.

6.2.2 Setting up Statement Types

Statements are the basic building blocks for solution types. A statement It comprises a summary field (2KB) and a detail field (2GB). Statements can have relationships with other statements and solution sets.

A statement type is an identifying name that is associated with a particular part of a solution used by your agency. Oracle CIC is seeded with Symptom/Cause/Action statement types. You can define your own statement types; they are flexible in terms of definition, and can be unlimited in number.

Prior to defining statement types, you should evaluate the way in which the solution process is currently performed. You should also determine if the current process needs to be enhanced.

The Knowledge Management system is totally flexible in terms of the statement type names that can be used. however, it is best to create statements using nomenclature which relates to the current or desired process steps.

To define statement types:

1. Using the Knowledge Management Administrator responsibility, log in to the Knowledge Management system. The Setup page on the SMS tab opens by default.

   If you want to verify the statement types currently available in Oracle CIC, Select the Statement Types link on the Setup page. The Statement Type page, listing the available statement types, opens.

2. Select the Create Type Link.

3. In the Type field, select Statement.

4. In the Name field, enter a name for the statement type. Note that the statement type name must be identical to the note type name (in Service Request) if you want to use notes to search the Knowledge Base.

5. Enter an appropriate description for the statement type.

6. Select the Create button to define the statement type, or the Clear button to delete the data you have entered.

7. Repeat steps 3-6 to define more statement types.

6.2.3 Setting up Solution Types

A solution type is a a segmentation of the Knowledge Base, depending on how the information is captured and used. Oracle CIC places no physical limit on the number of different solution types that can reside simultaneously in the Knowledge Base. Common solution types include:

- SCA (Symptom Cause Action) seeded

- PR (Problem Resolution)

- QA (Question Answer)

Symptoms, causes, and actions (SCA) is the seeded solution content format for developing Knowledge Management information; you may change this to fit your agency's particular needs

To define solution types:

1. Using the Knowledge Management Administrator responsibility, log in to the Knowledge Management system. The Setup page on the SMS tab opens by default.

   This page lists the solution types currently available in Oracle CIC.

2. Select the Create Type Link.

3. In the Type field, select Solution.

4. In the Name field, enter a name for the solution type.

5. Enter an appropriate description for the solution type.

6. Select the Create button to define the solution type, or the Clear button to delete the data you have entered.

7. Repeat steps 3-6 to define more solution types.

6.2.4 Associating Statement Types to Solution Types

By this stage, you have already created the statement types and the solution types appropriate for them. Associating statement types to a solution type builds the solution set. Before performing this step, you can modify the name of the solution type and make other changes/corrections, if needed.

While linking statement types to solution types, you can arrange the statement types in an appropriate sequence to enhance readability.

In addition to selecting which statement types belong in a solution type, you must also indicate which statement types are mandatory and must be completed prior to the solution being complete. This is important to ensure consistency. A solution should always be complete and not partial. In order for a solution to be complete, it must contain, at the minimum, an issue and a resolution.

To link statement types to solution types:

1. Using the Knowledge Management Administrator responsibility, log in to the Knowledge Management system. The Setup page on the SMS tab opens by default.

    This page lists the solution types currently available in Oracle CIC.

2. Select the solution type you want to link to statement types. You can select the solution type by selecting the hyper-linked solution type number.

3. Verify the name and description, if needed. If you update the solution type in any manner, you must save the changes by selecting the Update button below the Description field.

4. To associate the solution type to statement types:

    a. In the Related section, select Statement from the drop-down list.

    b. Select the Add/Delete button. The Associate Statement Types page opens. This page lists available statement types as well as the statement types, if any, already related to the solution type.

    c. Select the desired statement type from the Available Statement Types list and move them to the Selected Statement Types list. Repeat this procedure to move each statement type you want to relate to the solution type.

    d. To order the statement types, select a statement type from the Selected Statement Types list, and then click the appropriate sort button. The sort buttons are located above the Selected Statement Types list.

    e. Select the Save button to link the statement types in the Selected Statement Types list to the solution type.

    Statement types linked to the solution type are listed in the related section of the Solution Type page.

5. Define if the statement type is mandatory or optional. You must ensure that the Optional check box for each mandatory statement type is not selected. (By default, this check box is selected for all statement types.) If the Optional check box is not selected, Oracle CIC will always check to ensure that the statement type is entered when it creates the solution set. If all statements are designated optional, the system will not check for complete solutions.

> **Note:** The Optional check box allows you to define the minimum statement requirements for the solution type by defining mandatory statements.

6. Select the Update button to save your work.

6.2.5 Mapping Note Types to Statement Types

You must map note types to statement types to ensure the transfer of information between service request notes and Knowledge Management statements.

> **Note:** The procedure presented in this section is applicable to establishing links to other external objects, for example, service requests.

To map note types to statement types

1. Using the Knowledge Management Administrator responsibility, log in to the Knowledge Management system. The Setup page on the SMS tab opens by default.

2. Select the Statement Types link to navigate to the Statement Types page.

3. Select the statement type you want to link to a note type. You can select the statement type by selecting the hyper-linked statement type number.

4. Verify the name and description if needed. If you update the statement type in any manner, you must save the changes by selecting the Update button below the Description field.

5. To associate the statement type to a note type:

   a. In the Related section, select External Links from the drop-down list. The page will refresh and display any existing external links.

   b. If the note type you want to link to statement type is not displayed, select the Add button. The Select an External Object page opens.

    c. In the Object Name list, select Note Type to open the Note Type page. You can use this page to search for the note type you want to link. In this page:

        * Enter the name of the note type you want to link to the statement type. This name should match a service request note type name and the statement name.

        * Enter a description for the note type.

        * Click the Go button to search for the note type.

        * From the search results, select the note type you want to link to the statement type. Select the

        * Select the Update button.

Statement types linked to the Note type are listed in the related section of the Statement Type page.

6. If you want to remove an association, select the Remove check box.

7. Select the Update button to save your work.

6.2.6 Creating Statements (HTML)

Statements can be created and added to existing solutions, one at a time. When creating statements using the procedure presented in this section, you will populate the Knowledge Management database with independent statements belonging to a statement type. These should later be linked up so as to create a comprehensive solution set.

To create statements:

1. Using the Knowledge Management Administrator responsibility, log in to the Knowledge Management system. The Setup page on the SMS tab opens by default.

2. Select the Statement tab to navigate to the Search Statements page.

3. Click the Create link to navigate to the Create Statement page.

4. In the Statement Type field, select the type of statement you want to create.

5. Enter a concise description of the statement in the Summary field

6. Enter any additional information into the Detail field

   The detail field is not used in a search. It is like an attachment; it can be used to record important information on the statement.

7. Select the Create button to save the statement.

   The View Statement page opens. In this page, verify that the information is correct. Also write down the statement number. You will need it when linking the statement to a solution set.

6.2.7 Relating a Statement to a Solution

You can create a statement to a solution if you know the number of the statement. You will need to know the solution number or the solution name to search and display details of the solution to which the statement is to be linked. You will also need the number of the statement that you wish to link to the solution. Please note that a statement can be linked to multiple solutions.

To link a statement to a solution:

1. Using the Knowledge Management Administrator responsibility, log in to the Knowledge Management system. The Setup page on the SMS tab opens by default.

2. Select the Solution tab to navigate to the Search Solutions page.

3. Run a basic search:

   a. In the Solution Type field. select the solution type to which you wan to link the statement.

   b. Enter other criteria for the search. For example the solution number will uniquely identify a solution.

   c. Select the Go button to search for the solution. The search results appear on the Search Solution Results page.

4. Select the solution you want to link to the statement. You can do this by clicking the solution number, which is hyper-linked.

   The View Solution page containing details of the solution opens. This page also lists the statements currently linked to the solution.

5. Verify the existing solution information and make any necessary changes. Remember to select the Update button to save the changes, if any, you have made.

6. From the Related section, select the Add button. The Add Statement to Solution page opens.

   a. In the Statement No field, enter the number of the statement you wish to link to a solution.

   b. Select the Not check box to indicate that the statement is not significant or is proven to not be a part of the solution.

   c. Select the Done button to associate the statement to the solution.

   All linked statements are listed on the View Solution page.

7. Use the up and Down buttons to sequence the statements. For example, in a Symptom/Cause/Action solution, you may want to list the symptom, cause and action statements, in that order.

8. Select the Update button to save your work.

6.2.8 Setting up Solution Sets

A solution set comprises one or more statements. It has a title and links to statements. It defines the minimum number of statements for a complete solution and includes limits on who can view the solutions.

When entering a new solution it is important to verify whether there is an identical solution existing in the database. An efficient Knowledge Base gives accurate and fast results, and avoids duplicate solutions.

The status specified for the solution set determines the audience for the information. If the status is set to Public, the solution can be viewed by all users.

To create solution sets:

1. Using the Knowledge Management Administrator responsibility, log in to the Knowledge Management system. The Setup page on the SMS tab opens by default.

2. Select the Solution tab to navigate to the Search Solutions page. Select the Advanced Search/Create link to open the Search/Create Solutions page. This page can be used for creating solution sets and for searching for solutions and statements. In this procedure, we are building a solution set.

3. In the Solution Types field, select the solution type you want to define. This selection determines the LOV for the Type field.

4. Select the Not check box to indicate that the statement is not significant or is proven to not be a part of the solution.

5. In the Type field select a statement type that you want to create as part of the solution set. Remember that the solution set contains a number of statements.

6. If you want to search the database for similar statements:

    a. Select a search criterion from the drop down list near the Go button. This criterion (for example, Matching Statements) would be used as the basis for searching the database (in our example to find a statement that matches the statement in the in the Description field.

    b. Select the Go button.

7. In the Description field, enter a concise description for the statement. The description becomes a searchable component in the Knowledge Base database.

8. To add additional statements for the solution set, select the Add Row button to open a new row. Repeat steps 4-6. For example, in a Symptom/Cause/Action solution type, you will create statements for symptom, cause and action.

> **Notes:** Use the Del Row to delete the current statement. Use the Select radio button corresponding to a row to make it the current statement.

9. Select the Create Solution button to define the solution set.

6.2.9 Defining Frequently Used Solutions

Frequently used solutions presents the solutions that were most successful in solving citizens issues in a given period of time. They are accessible from the homepage so that any citizen logging on to the site can easily identify the more common issues solved by your agency.

Each time a citizen clicks the Solved button in the Knowledge Base system, a concurrent program updates the solution used count by one; this count can be incremented only once during a user's session. The solution used count over a specified number of days determine the frequently used solution. You can create multiple definitions for varying number of days so as to compile a list of frequently used solutions. For example, if a parameter defines 7 days as the basis for comparing the solution used count, the solution that has the highest count over a period of 7 days will be displayed as the frequently used solution.

You can create a number of definitions (for example, one week, one year, etc.) based on which frequently used solution are made available to citizens. Of these, the frequently used solution denoted by the default definition is listed when a citizen opens the Common Problems page using the Frequently Used Solutions link on the homepage. The solutions denoted by the remaining definitions can be viewed by selecting the appropriate definition from the View drop-down list.

To define frequently used solutions:

1. Using the Knowledge Management Administrator responsibility, log in to the Knowledge Management system. The Setup page on the SMS tab opens by default.

2. Select the Solution tab to navigate to the Search Solutions page. Select the Frequently Used Definition link to open the Frequently Used Definitions page.

   From this page you can add or remove the parameters for displaying frequently used solutions on the Common Problems page. Note that frequently used solutions are made available for all the definitions on this page.

3. To add a parameter:

   a. Select the Add button. The Add Definition page opens.

   b. Enter a name and description for the parameter. Also enter the number of days for which the solution used count should be displayed.

   c. Select the Save button to save your work and return to the Frequently Used Definitions page. The parameter you have just defined will be listed in this page.

4. To set the default parameter for displaying frequently used solution:

   a. On the Frequently Used Definitions page, select the Default radio button of the definition that is to be set as the default definition.

   b. Select the Update button.

5. To delete a definition:

   a. On the Frequently Used Definitions page, select the Remove check box of all the parameters you want to delete.

   b. Select the Update button.

6.2.10 Setting up Recommended Solutions

Recommended solutions list, available on the Common Problems page, attempts to proactively provide solutions based on issues expected to arise in the near future. For example, your agency may want to provide solutions for disposing the christmas trees in late December, or for coping with flooding in the rainy season.

The solutions listed in the recommended solutions list are arbitrarily selected to cater to an expected eventuality, which may or may not occur. This list allows users to bypass the Knowledge Base search for solutions in certain situations. Prior to adding a recommended solution, you must identify the unique solution number. This number is required for adding a solution to the recommended list.

To define recommended solutions:

1. Using the Knowledge Management Administrator responsibility, log in to the Knowledge Management system. The Setup page on the SMS tab opens by default.

2. Select the Solution tab to navigate to the Search Solutions page. Select the Recommended link to open the Recommended Solutions page.

   From this page you can add or remove recommended solutions and rearrange their display sequence. Note that the recommended solutions listed on the Common Problems page exactly match the solutions defined on this page.

3. To add a solution:

   a. Select the Add button. The Add Recommended Solution page opens.

   b. Enter the solution number that uniquely identifies the recommended solution.

   c. Select the Done button to save your work and return to the Recommended Solutions page.

4. To delete a solution from the list:

   a. Select the Selections radio button corresponding to the solution you want to remove from the list.

   b. Select the Delete button.

5. To change the display sequence:

   a. Select the Selections radio button corresponding to the solution you want to resequence.

   b. Select the Move Up or Move Down button.

6.2.11 Running the Knowledge Management Concurrent Programs

After setting up the solution sets for your Knowledge Base, you must run the following programs:

- Knowledge Base Sync Index

- Knowledge Base Update Used Count Summary

Knowledge Base Sync Index

This program synchronizes the InterMedia Index. Oracle CIC uses the InterMedia Index for searching the Knowledge Base database.

To be able to retrieve any solutions that are entered in the Knowledge Base, the InterMedia Index needs to be synchronized periodically. If new solutions are not retrievable after they have been entered, the most likely cause is that either this concurrent program is not running or that the interval specified for it to run is too long.

Knowledge Base Update Used Count Summary

This program is used to determine the most frequently used solutions and part of the solution score when performing a search.

Frequently used solutions lists the top *n* solutions, defined for your agency, based on the number of times that a solution has been used to solve an issue. Each time the Solved button is clicked, the concurrent program updates the count by one. The solution used count for a solution can be incremented only one time during a user's session.

The solution score found in the Search Results pages uses the solution used count and the InterMedia text match score to help place the solution properly in the search results list. The higher the used count and the text match score, the higher the solution is placed in the results list.

For detailed information on running concurrent programs, please refer to the section titled "Using Standard Request Submission" in *Oracle Applications User's Guide*.

6.3 Setting up the Marketing Encyclopedia System

Oracle CIC uses the Marketing Encyclopedia System (MES) to create, publish, and manage content. The content managed using MES is generally technical documents such as white papers, technical bulletins, installation instructions, etc.

MES stores information in its own database and uses a hierarchical approach to allow a user to select a major category and search subcategories in the browse mode.

Please note that all MES related settings are application specific. You should be creating all the settings for the iSupport module of Oracle CIC.

MES uses multiple document formats. Any text format that InterMedia Text is capable of searching can be used in MES.

6.3.1 Setting up Channel

Channel (MES): A sub-category within a category; for example, in a category called Application Software, channels might be defined as Financial, Inventory, Manufacturing, and so on.

Channel Access Privileges (MES): Define access status for a channel that is mapped to users and groups

6.3.2 Publishing Contents on Oracle CIC Self-Service Homepage

To publish content to MES to be viewed in Oracle CIC Self-Service:

1. Set up the following MES related concurrent programs.

    ■   MES Intermedia Index Sync Operation to be scheduled (every three hours).

    ■   MES Intermedia Index Optimization Operation (every seven days). Use [parameter p_optimization_level=fast or full].

    ■   JTF Intermedia Sync Operation (every three hours).

    ■   JTF Intermedia Index Operation (Every seven days) Use [parameter p_ optimization_level=fast or full].

2. Run a script to alter the index on FND_LOBS table whenever you store a URL or a file. This index has to be periodically rebuilt depending on the volatility of the data and after every large uploads.

3. Create a user group using the following steps:

    a.   Log on to Oracle iSupport as an iSupport Administrator user.

    b.   Click the Support tab and the UserGroup sub tab.

    c.   Click Create.

4. Enter the start and end dates for the user group and enter a SQL statement of the following type:

```
select party_id from hz_parties where party_id in

(select customer_id from fnd_user where user_name is like
'ABC%')
```

5. Integrate with MES by following these steps:

    a. Log on to Oracle Applications Forms. Responsibilities window appears.

    b. Select the System Administrator responsibility.

    c. Run the iSupport User Group Creation Concurrent program. This creates a group channel in MES.

    > **Note:** n the Search query, the user_name is case sensitive and must be entered in uppercase.

6. Publish content in MES.

7. Integrate with Oracle CIC Self-Service by following these steps:

    a. Create a category for company news and publish items to it.

    b. Create a category for technical library and publish items to it.

    c. Publish items to the group channel corresponding to the user group. The published items can be seen as Alerts on the Homepage.

8. Map MES categories to Oracle CIC Self-Service by following these steps:

    a. From the JTF Log in screen, log on as an Oracle CIC Self-Service Administrator.

    b. Click Administration > Support tab > Technical Library.

    c. Associate the technical library to the appropriate category in MES.

6.3.3 Testing MES Setup

The following procedure explains how you can test if MES is properly set up to work with Oracle CIC Self-Service.

To test that MES has been properly set up:

1. Verify that categories, sub-categories, and channels are defined in MES.

2. Log on to Oracle CIC Self-Service as Knowledge Management Administrator.

3. From the MES tab, select the Publish sub tab.

4. Contribute a document to MES.

5. Run the MES concurrent programs.

6. Set up Technical Library in Oracle CIC Self-Service Administration screen.

7. Log on to Oracle iSupport as a regular user.

8. Search for the document by navigating to the Technical Library using the following path:

    Homepage > Find a Solution > Technical Library.

    Successfully finding the document indicates that you have properly set up MES.

6.3.4 Integrating with *i*Support

To integrate MES with iSupport:

1. Create a Category for Company News and publish items to it.

2. Create a Category for Technical Library and publish items to it.

3. Publish items to the group channel(s) corresponding to the Usergroup(s) defined for iSupport Forums.

6.4 Setting up Forums

This section details how to set up and maintain Forums in Oracle CIC Self-Service. You can set up individual Forums as open or with the Restricted Access.

6.4.1 Defining Forums

To set up Forums without restricted access functionality, there are two steps:

- Creating at least one Category.

- Creating at least one Forum.

6.4.1.1 Creating Category

Before users can post to Forums and reply to messages, Oracle CIC Self-Service Administrator must create a category and a Forum within that category. Categories serve to organize Forums into topic or discussion areas.

To create a Category:

1. At the JTF login, log in as the Oracle CIC Self-Service Administrator.

2. Navigate to Administration > Forum > Category > Create.

3. To have the new Category exist at the root level, leave the Choose a parent category field set to Category Root. To place the new Category underneath another Category, select the parent category from the Choose a parent category drop-down list.

4. Enter a name for the Category in the Enter the name of the new category field.

5. Leave the Access Type as Open. Restricted categories are not currently supported.

6. Select Create.

7. At the confirmation screen select Ok.

6.4.2 Creating Forum

The Oracle CIC Self-Service Administrator must create at least one Forum within a Category.

To create a Forum:

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

2. Navigate to Administration > Forum > Forum > Create.

3. Select the Category where the Forum will be located.

4. Enter a name for the Forum in the Enter forum name field.

5. Leave the Access Type as Open. You can change this later, if needed.

> **Note:**   If Access Type is Open, it is accessible to all users. If you want to restrict access to the Forum at this point, select the Restrict option.

6. Select Create.

7. At the confirmation screen select Ok.

> **Note:**   There is no limit to the number of Forums you can create within any given category.

6.4.3 Restricting Forum Access Type

In order to restrict access to a Forum, you must set up a Usergroup and then associate that Usergroup with the Forum that you wish to restrict. To view or post messages within a restricted Forum, users must belong to the Usergroup associated with that Forum. Note that Usergroups are the same for iSupport Forums and for MES.

> **Note:**   Users who are not members of the Usergroup associated with the restricted Forum cannot view the Forum. Consider informing your users of the existence and nature of restricted Forums so that they can request inclusion in them, if appropriate.

To set Forum access type to restricted:

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

2. Navigate to Administration > Forum > Forum > Modify Status.

3. Select the Forum to modify from the drop-down list.

4. Under Access Type, select the radio button next to Restricted.

5. Select Modify.

6. A confirmation screen appears.

To create a Usergroup:

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

2. Navigate to Administration > Support > Usergroup > Create.

3. Click the calendar icon next to Start Date and select a start date for the group. Repeat for End Date.

4. Enter a description for the Usergroup.

5. Enter an SQL statement to define the usergroup.

   ■ Sample SQL statement number 1: This statement will return customers in the U.S. that have placed orders where the order amount is more than $10,000.

   ```
   select party_id from hz_parties

   where country='US' and total_ordered_amount > 10000
   ```

   ■ Sample SQL statement number 2: This statement will return all employees for the company.

   ```
   select user_id from fnd_user where employee_id >0
   ```

   Both these sample statements would return a very large list. For management purposes, it is better to define usergroups by function, for example, the sales team, or the support team, in which case an extra where clause would be entered by the administrator. Please consult your information systems administrator for more details.

6. Select Save.

6.4.4 Running the Usergroup Creation Concurrent Program

In order to populate additional tables and make the Usergroup visible in MES it is necessary to run the Usergroup Creation concurrent program. The concurrent program must be run each time you update or add users to a Usergroup.

6.4.5 Associating Usergroup to Restricted Forum

When you choose the Access Type of Restricted for a Forum, you must associate a Usergroup with that Forum.

To associate a usergroup to a restricted Forum:

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

2. Navigate to Administration > Forum > Usergroup > Associate.

3. Choose a Forum from the drop-down list.

4. Choose a Usergroup to associate with the Forum.

5. Select Associate.

6. A confirmation screen appears.

6.4.6 Verifying /Testing Restricted Forum

Verification of the restricted Forum for the Usergroup involves posting a message to the Forum after accessing it.

To verify restricted Forum functionality:

1. At the JTF login, log in as a Regular User who is a member of a Usergroup.

2. Navigate to Forums.

3. Access the restricted Forum associated with your Usergroup.

4. Post a message to the restricted Forum.

5. Log out.

6. Log in to the JTF login as the same user.

7. Navigate to the Forum you posted a message to above (or search for the message you posted).

8. Verify that you can view the message you have just posted.

6.4.7 Changing Forum Access Type

You can change the forum access from restricted to open. You can also set the access type to disabled. You will need to close access to a Forum while preparing it for public or restricted viewing. This is accomplished by setting the access type to disabled.

To change Forum access from restricted to open:

1. Login to Oracle iSupport as Oracle iSupport Administrator.

2. Navigate to Administration > Forum > Forum > Modify Status.

3. In the drop-down box, select the restricted Forum you want to change.

4. Choose Access Type Open or Disabled, as needed.

5. Select Modify.

6. Click Ok to confirmation message.

6.4.8 Setting up Forums Search Function

To use the Forums search function:

1. Within Oracle iSupport, navigate to the Forum tab.

2. Select Advanced Search

3. Enter data in any one or all of the following fields:

■   Subject Keyword(s) - Enter keywords that may be in the message headers of the appropriate messages.

■   Message Keyword(s) - Enter keywords that may be in the bodies of the appropriate messages.

■   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.

■   Date - Select the calendar icon to the right of the text field, select a date, and then select a radio button: Before will find all messages posted before the date chosen, and After will find all messages posted after the date chosen.

■   Author - Enter the name of the author of the message. Use the format <first name> <space> <last name>

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

4. Select Search. The application will return a list of messages matching your search criteria.

Search Results

Search results are organized into table format, showing the following data, organized into columns:

- Score: The score assigned by the search engine, used to indicate the closeness of the match.

- Subject Name: The message header or subject.

- Author: The name of the person who posted the message.

- Date: The date the message was posted.

To view the message, click on the underlined link under Subject Name. You will then be able to reply to the message or start a new message thread within the message.

6.4.9 Maintaining Categories, Forums, and Messages

Below are some instructions for performing common Forum maintenance tasks.

6.4.9.1 Maintaining Categories

Following are directions for common Category maintenance tasks.

To delete a Category:

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

2. Navigate to Administration > Forum > Category > Delete.

3. Select the Category to delete from the drop-down list.

4. Select Ok.

5. A confirmation message appears.

To rename a Category:

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

2. Navigate to Administration > Forum > Category > Rename.

3. Select the Category to rename from the drop-down list.

4. Select Modify and enter the new name.

5. A confirmation screen appears.

6.4.9.2 Maintaining Forums

Following are instructions for maintaining Forums.

To delete a Forum:

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

2. Navigate to Administration > Forum > Forum > Delete.

3. Select the Forum to delete from the drop-down list.

4. Select Remove.

5. A confirmation screen appears; click Ok.

To rename a Forum:

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

2. Navigate to Administration > Forum > Forum > Rename.

3. Select the Forum to rename from the drop-down list.

4. Enter the new name and select Modify.

5. A confirmation screen appears; click Ok.

To move a Forum from one Category to another Category:

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

2. Navigate to Administration > Forum > Forum > Move.

3. Choose the Forum to move from the drop-down list.

4. Choose the destination Category.

5. Select Move.

6. A confirmation screen appears; click Ok.

To modify the access type of a Forum:

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

2. Navigate to Administration > Forum > Forum > Modify Status.

3. Select the Forum to modify from the drop-down list.

4. Change the Access Type by selecting the radio button next to the type.

   ■ Open: All users have access.

   ■ Restricted: Only members of a Usergroup have access.

   ■ Disable: No users have access; no one will see the Forum in the list of available Forums.

5. Select Modify.

6. A confirmation screen appears; click Ok.

To modify attributes of a Forum:

The Administrator may add or modify attributes to a Forum in order to increase the organizational and searching capacities of the Forum:

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

2. Navigate to Administration > Forum > Forum > Modify Attribute.

3. Choose the Forum to modify from the drop-down list.

4. Select Next.

5. Select Add New Attribute. The Add Forum Attributes screen displays.

6. Enter the name of the attribute in the Header Name field.

7. Select Mandatory only if you want to require users to fill in an attribute when posting to the Forum. The header value is the default value for this attribute.

8. Select Save.

9. A confirmation screen appears; click Ok.

To disassociate a Usergroup from a Forum:

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

2. Navigate to Administration > Forum > Usergroup > Disassociate.

3. Choose a Forum from the drop-down list.

4. Select Next.

5. In the Disassociate Usergroup screen, select a Usergroup from the drop-down list.

6. Select Next.

7. A confirmation screen appears; click Ok.

6.4.9.3 Maintaining Messages

Following are directions for common message maintenance tasks.

To delete messages from Forums:

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

2. Navigate to Administration > Forum > Messages.

3. From the drop-down list, select the Forum that contains message to be deleted.

4. Select Next.

5. The Message Management screen displays a list of all messages, the dates they were posted and the authors' names. Select the underlined link, Delete, next to the message you want to delete.

6. A confirmation screen appears; click Ok.

To move messages from one Forum to another:

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

2. Navigate to Administration > Forum > Messages.

3. From the drop-down list, select the Forum that contains message to be moved.

4. Select Next.

5. The Message Management screen displays with a list of all messages, the dates they were posted and the authors' names. Select the underlined link, Move, next to the message you want to move.

6. From the drop-down list, select the destination Forum for the message and select Ok.

7. A confirmation screen appears; click OK.

6.4.10 Disabling Menu Option

If you do not plan to use Forums, you can disable the Forums tab of Oracle CIC Self-Service. This is done by de-selecting the menus IBU_CMN_FORUM. For directions on how to do this, refer to *Oracle Applications System Administrator's Guide* Release 11i.

6.5 Setting up Citizen Homepage

Homepage is the first page presented to a citizen when he/she logs on to Oracle CIC. It is a personalizable work area where the citizen can access Oracle CIC from the web.

While setting up the Homepage, you can accept the default settings shipped with Oracle CIC, add bins and alter the contents of the bins.

This section details how to set up the Homepage in Oracle CIC Self-Service. Topics discussed in this section include:

- Using Default Content and Layout

- Altering Content and Layout

- Setting up Subscriptions

6.5.1 Using Default Content and Layout

If you do not wish to add bins or content or change the layout of the Homepage, you can leave the default setup as it is. The following sections present instructions on alter the defaults. Oracle CIC Self-Service uses the following four default bins:

- **Service Requests** This bin contains Service Request information. You must set up the service request functionality to use this feature.

- **How Can We Help You?** This bin contains three hyperlinks to commonly-used functions:

    * Find a Solution: a link to the Knowledge Management search screen. You must have Knowledge Management set up to access this link.

    * Frequently Used Solutions: a link to the solutions in Knowledge Management that have been designated as Frequently Used Solutions. You must have Knowledge Management set up to access this link.

    * Create Service Request: a a link to the create service request function. You must have Service Request set up to access this link.

- **Alerts.** This bin contains hyperlinks to any Alerts you have set up in the Marketing Encyclopedia System (MES). You must have MES set up to access this link.

- **Account**. This bin displays user account information.

6.5.2 Testing/Verifying Default Content

Use the following procedures to test that you have properly set up the Homepage using the default content and layout.

To test Homepage setup:

1. Log in to the JTF login as a Regular User.

2. Verify that you can see the default content on the Homepage.

6.5.3 Altering Content and Layout

There are two areas of the Homepage that you can alter: the content and the layout.

6.5.3.1 About Homepage Content

Homepage Content is defined as either Mandatory or Optional, as described below:

Mandatory Content: Information identified as mandatory stays at a fixed location on the Homepage; users cannot disable it. Any content can be made mandatory by your agency.

> **Note:** Note: With Mandatory Content, the user has the ability to edit the format of some bins selecting the Edit link on the top of the bin. For example, if you set up Service Requests as a mandatory bin, the user can still choose the fields that are displayed within the bin.

Optional Content: Users can choose not to display the content or can change its layout on the Homepage. Your agency can identify any content as optional.

Information on the Homepage comes from various sources, defined by your agency.

6.5.3.2 Adding MES Content

The Marketing Encyclopedia System (MES) supplies the seeded Alerts bin. It is also the source for Company News, if you choose to set up Company News. Follow the instructions below to add MES content.

> **Note:** You must already have set up the Marketing Encyclopedia System.

To add MES content:

1. Log into the JTF login screen as the Oracle iSupport Administrator.

2. Navigate to Administration > Homepage > Content > Add MES Content.

3. In the Add MES Content screen, select the content that you wish to add by clicking on the check box next to the content name.

4. Select Save. The Content Administration screen appears.

5. Optionally, to restore original values click Clear, or select Cancel to return to the previous screen without saving.

6.5.3.3 Changing Content Layout

To change the layout of the content:

1. Log into the JTF login screen as the Oracle iSupport Administrator.

2. Navigate to Administration > Homepage > Content > Mandatory Layout.

3. To change whether the bins are displayed in a wide column or a narrow column, use the directional buttons (<) (>). Content defined as Narrow format can be moved into Wide column, but not vice versa.

4. To change the order of the bins, use the up and down arrow buttons at the top of the two windows.

5. When finished, select Update. Optionally, to return to original values, select Cancel.

6.5.3.4 Testing/Verifying Content Layout

To test changes to Homepage layout:

1. Log in to the JTF login as a Regular User.

2. Verify that you can see the new layout on Homepage.

6.5.3.5 Altering Existing Content

To alter information on the Homepage:

1. Log into the JTF login screen as the Oracle CIC Self-Service Administrator.

2. Navigate to Administration > Homepage > Content.

3. In the Content Administration window, select the underlined link of the content to alter.

4. The items that you can alter will vary depending upon the content. Most content will have the following alterable fields.

   ■ Content Name: This is bin name, which is currently not editable.

   ■ Format: Use the drop-down menu to select Wide or Narrow. Wide content display is twice as wide as the Narrow content. If you choose Wide, the category will always be displayed in Wide format on the user's Homepage. If you choose Narrow, users will have the choice when setting up their Homepages to display the category in Wide or Narrow format, but only for bins that are not mandatory. It is not recommended set as Narrow information that would best be displayed in a wide format, for example, long blocks of text.

   ■ View Status: This field determines what class(es) of users can view the information. The View Status column displays either Employee, Customer, or Both. If the status is Both, then both the Merchant and the Customer type of user may view the information. Employees of your company will be in the Merchant class, while persons registering from outside the company, i.e., customers, will be in the Customer class of user.

   ■ Content Source: Either a PL/SQL package name or Java object path provides the content information.

      * If the choice is PL/SQL, the merchant must provide a valid PL/SQL package name in the text box next to the drop-down field. Please consult your information systems administrator for more information.

> * If the choice is Java Object, the merchant must provide a Java class name, in the text box next to the drop-down field, which adheres to the standard interface, i.e., provides an API to retrieve. Please consult your information systems administrator for more information.

- Mandatory: Requires display of the information at a fixed location on the Homepage. Users cannot change the location or whether or not the content displays on their Homepages. Bins set as Mandatory will always display at the top of the column.

- Disable - Disables the content.

5. Select Update.

6. Optionally, to restore original values click Restore, or select Cancel to return to the previous screen without saving.

6.5.3.6 Testing/Verifying Non-Default Content

This section presents the steps you should follow to verify that the Home page is working properly using the content you added using the preceding procedure:

To test the Homepage:

1. Log in to the JTF login as a Regular User.

2. Verify that you can see the new content on Homepage.

6.5.4 Overview of Content Administration Screen

The Content Administration screen displays content variables. Below is a discussion of the content displayed.

- Checkboxes column: To delete an item, select the check box and click Delete Content. You cannot undo the delete.

- Content Name column: Oracle CIC Self-Service contains four seeded content categories. These are: Account, How can we help you?, Service Request, and Alerts. Your agency can add categories by clicking Add Content or Add MES Content.

- Disable Column: Indicates that the content is unavailable to users.

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

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

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

- View Status Column: The View Status column displays either Employee, Customer, or Both. This setting indicates what class(es) of users may view the information. For example, if the status is Both, then both the Employee and the citizens may view the information.

6.5.5 Setting up Subscriptions

Oracle CIC Self-Service allows users to receive content from the Homepage in an e-mail. If the user elects to receive this e-mail, it is necessary for the user to select the Enable Email Subscription in the user profile. The Oracle CIC Self-Service Administrator must set up Subscription Templates and Email Interval options to enable this functionality.

To set up subscription templates for email content:

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

2. Navigate to Homepage > Subscription.

3. In the Subscription Template Administration screen, choose a language for the headers and footers of the template.

> **Note:** The language you select as the template header/footer language, will not affect the language of the body of the e-mail. The language of the body is determined by the language chosen in the User Profile screen.

4. In the Subject text field, enter the name of the subscription template.

5. In the Header field, enter the information you want in the header. Seeded values for both header and footer are located in the Clue Word/Description table at the bottom of the screen.

6. In the footer field, enter the information you want in the footer.

7. Select Update to Save the changes, Restore to return to original values, or Reload.

6.5.6 Setting up Email Interval

To set up the time interval options between e-mails:

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

2. Navigate to Homepage > Subscription > Email Interval.

3. In the Email Subscription Interval screen, choose the minimum time between e-mails in the Range Start text box.

4. In the Range End box, select the maximum time between e-mails.

5. In the Range Step box, set the step between the start and end time.

6. In the Default Interval text box, set the default interval to appear in the drop-down list.

7. Select Update to save or Restore to return to previous values.

6.5.7 Running Subscriptions Concurrent Program

Notification Mailer, the Subscriptions concurrent program for tracking user subscriptions in the queue must be configured from Oracle Applications.

7

Setting Up Profiles

This chapter provides detailed information on the profile options that you must set up to implement Oracle CIC.

7.1 Setting Up Profile Options

Profile is a set of changeable options that affect the way your application looks and behaves. As System Administrator, you control how Oracle CIC operates by setting profile options to the values you want. You can set profile options at four different levels: site, application, responsibility, and user. For a detailed discussion of User Profile options, please refer to the *Oracle Applications System Administrator's Guide.*

When a profile option may be set at more than one level, site has the lowest priority, superseded by application, then responsibility, with user having the highest priority. For example, a value entered at the site level may be overridden by values entered at any other level. A value entered at the user level has the highest priority, and overrides values entered at any other level.

Use the System Profile Values window to set the up profile values. The following profile options may be modified to customize Oracle CIC to suit your specific requirements.

- Service: Allow Service Date Change

- Service: Auto Launch Web Workflow

- Service: Auto Launch Workflow

- Service: Auto Generate System Name

- Service: Cascade System Termination

- Service: Create Tasks Privilege

- Service: Critical Customer Check

- Service: Day Unit of Measure

- Service: Default Action Owner

- Service: Default Action Severity

- Service: Default Conversion Type

- Service: Default Interaction Method

- Service: Default Interaction Type

- Service: Default Make Public Flag

- Service: Default Service Request Owner

- Service: Default Service Request Owner Type

- Service: Default Service Request Severity

- Service: Default Service Request Type

- Service: Default Service Request Urgency

- Service: Default Service Request Status

- Service: Default Knowledge Base Solution Type

- Service: Default Task Assignee on the Service Request Tasks tab

- Service: Default Task Owner on the Service Request Tasks tab

- Service: Field Service Transaction Type

- Service: Minimum Service Duration

- Service: Minute Unit of Measure

- Service: Month Unit-of-Measure

- Service: Profile Check Group

- Service: Profile Rating A Label

- Service: Profile Rating B Label

- Service: Profile Rating C Label

- Service: Set Customer Product To Latest Revision

- Service: System Name Update Allowed

- Service: Time Unit Of Measure Class

- Service: Update Tasks Privilege

- Service: User Currency Code

- Service: View All Tasks Privilege

- Service: Workflow Administrator

- JTF_PROFILE_DEFAULT_APPLICATION

- Notes: Default Note Status

- JTF_PROFILE_DEFAULT_RESPONSIBILITY

- Default Escalation Status

- Default Escalation Level

- Default Escalation Reason

- Default Document Type

- Default Reference Type

- Escalation:Default Contact Type

- Escalation:Default Notify (Y/N)

- Escalation:Default Customer Contact Point

- Default New Note Type

- Service: Allow Knowledge Note Update

- Service: Default Knowledge Base solution Type

- Default Status for Knowledge Base Contributions

- Maximum number of search results to be queried from the database

- JTF_TASK_DEFAULT_TASK_TYPE

- JTF_TASK_DEFAUT_TASK_STATUS

- JTF_TASK_DEFAULT_TASK_PRIORITY

- CUG_TASK_FAILED_STATUS

- CUG_TASK_SUCCESS_STATUS

- IEU: Queue: Forecasts

- IEU: Queue: Leads

- IEU: Queue: My Tasks

- IEU: QresType: MyWork
- IEU: Queue: Opportunities
- IEU: Queue: Service Requests
- IEU: Queue: Tasks
- CSF: Default New tasks status
- CSF: Default "In planning" task status
- CSF: Default Assigned task status
- CSF: Default Cancelled task status
- CSF: Selected territories
- CSF: The unit of measure for hour
- CSF: The unit of measure for minutes
- Customer Care: Default Territory for Contact Center
- Customer Care: Default Outcomes for Interactions
- Customer Care: Default Party Type
- Customer Care: New Contact Default Phone Type
- Customer Care: Default Reason for Interactions
- Customer Care: Default Results for Interactions
- Customer Care: Default Tab for Contact Center
- Customer Care: Log Task Activities flag
- Customer Care: Number of Interactions Displayed in Contact Center
- Customer Care: Critical Customer Check
- Customer Care: Default Relation for Person
- Customer Care: Service Request Form Check
- Contact Center: New Contact Default Address Type
- Contact Center: New Contact Default Create Account
- JTF: Access All Calendars

- Terr: Multiple Winning Territories
- JTF_PROFILE_DEFAULT_BLANK_ROWS
- JTF_PROFILE_DEFAULT_CSS
- JTF_PROFILE_DEFAULT_NUM_ROWS

Service: Allow Service Date Change

This profile determines if users can change the service start and end dates. Do not specify a value for this profile.

Profile Level: Site.

Service: Auto Launch Web Workflow

This profile determines if the system will automatically launch web workflow whenever a new web service request is added.

Profile Level: Site.

Suggested Profile Value: No

Service: Auto Launch Workflow

This profile determines if the system will automatically launch the appropriate workflow whenever a new service request is added.

Profile Level: Site.

Suggested Profile Value: No.

Service: Auto Generate System Name

This profile determines if new system name updates are allowed.

Profile Level: Site.

Suggested Profile Value: No.

Service: Cascade System Termination

This profile determines if system termination dates should be cascaded to related customer products.

Profile Level: Site.

Suggested Profile Value: No.

Service: Create Tasks Privilege

This profile determines if responsibilities are to be allowed the privilege of creating tasks.

Profile Level: Site.

Suggested Profile Value: No.

Service: Critical Customer Check

This profile defines the criterion based on which the criticality of a customer is determined.

Profile Level: Site.

Service: Day Unit of Measure

This profile identifies the unit of measure representing the day.

Profile Level: Site.

Suggested Profile Value: Minute.

Service: Default Action Owner

This profile determines the default service request action owner.

Profile Level: Site.

Service: Default Action Severity

This profile determines the default severity level to be assigned to the new service requests.

Profile Level: Site.

Suggested Profile Value: Medium

Service: Default Conversion Type

This profile define the default conversion type for multi-currency conversions.

Profile Level: Site.

Suggested Profile Value: Corporate.

Service: Default Interaction Method

This profile defines the default method to be used for entering manual interactions.

Profile Level: Site.

Suggested Profile Value: Inbound Call.

Service: Default Interaction Type

his profile defines the default type to be used for entering manual interactions.

Profile Level: Site.

Suggested Profile Value: New Call

Service: Default Make Public Flag

This profile determines the default setting for the Make Public flag.

Profile Level: Site.

Suggested Profile Value: Yes.

Service: Default Service Request Owner

This profile sets the default service request owner.

Profile Level: Site, User.

Service: Default Service Request Owner Type

This profile sets the default service request owner type.

Profile Level: Site.

Suggested Profile Value: Employee Resource

Service: Default Service Request Severity

This profile sets the default service request severity.

Profile Level: Site.

Suggested Profile Value: High

Service: Default Service Request Type

This profile determines the default service request type that can be created.

Profile Level: Site.

Suggested Profile Value: Sanitation

Service: Default Service Request Urgency

This profile sets the default value to be assigned as service request urgency.

Profile Level: Site.

Suggested Profile Value: Standard

Service: Default Service Request Status

This profile selects the default status for a new service request.

Profile Level: Site.

Suggested Profile Value: Open

Service: Default Knowledge Base Solution Type

This profile determines the default solution type that will be created when a user enters a solution using the Agent Knowledge Base Contribution window.

Profile Level: Site.

Suggested Profile Value: Inquiry-Solution

Service: Default Task Assignee on the Service Request Tasks tab

This profile determines the resource to whom the new task would be assigned by default when a task is created from the Service Request tab.

Profile Level: Site.

Service: Default Task Owner on the Service Request Tasks tab

This profile determines the resource to whom the ownership of the new task would be assigned by default when a task is created from the Service Request tab.

Profile Level: Site.

Service: Field Service Transaction Type

This profile sets the transaction type that will be created in Oracle Field Service.

Profile Level: Site.

Suggested Profile Value: Field Service.

Service: Minimum Service Duration

This profile determines the minimum duration allowed for a service program.

Profile Level: Site.

Suggested Profile Value: 0.

Service: Minute Unit of Measure

This profile determines the default service effort.

Profile Level: Site.

Suggested Profile Value: Minute.

Service: Month Unit-of-Measure

This profile identifies the unit of measure representing the month.

Profile Level: Site.

Suggested Profile Value: Minute.

Service: Profile Check Group

This profile determines the default check group used for determining customer profile.

Profile Level: Site.

Service: Profile Rating A Label

This profile sets the label to indicate a profile check result range that is considered to be of A rating.

Profile Level: Site.

Service: Profile Rating B Label

This profile sets the label to indicate a profile check result range that is considered to be of B rating.

Profile Level: Site.

Service: Profile Rating C Label

This profile sets the label to indicate a profile check result range that is considered to be of C rating.

Profile Level: Site.

Service: Set Customer Product To Latest Revision

This profile determines if the customer product's current revision is automatically updated when a revision update is ordered for it.

Profile Level: Site.

Suggested Profile Value: No.

Service: System Name Update Allowed

This profile determines if system name updates are permitted.

Profile Level: Site.

Suggested Profile Value: No.

Service: Time Unit Of Measure Class

This profile sets the unit of measure class representing time periods.

Profile Level: Site.

Suggested Profile Value: Time.

Service: Update Tasks Privilege

This profile determines if the current responsibility can update tasks.

Profile Level: Site.

Suggested Profile Value: Yes.

Service: User Currency Code

This profile sets the user currency for multi-currency conversions.

Profile Level: Site.

Suggested Profile Value: USD.

Service: View All Tasks Privilege

This profile determines if the current responsibility can view all tasks.

Profile Level: Site.

Suggested Profile Value: Yes.

Service: Workflow Administrator

This profile determines the applications user who can administer Oracle Service workflows.

Profile Level: Site.

Suggested Profile Value: SYSADMIN.

JTF_PROFILE_DEFAULT_APPLICATION

This profile determines the default HTML application for the user, if the user has been assigned the appropriate access responsibility (see JTF_PROFILE_DEFAULT_ RESPONSIBILITY) by the System Administrator. For this profile option to work properly, you, as system administrator, must assign the appropriate responsibility to the application user and then set this profile value to the Application ID.

Profile Level: User.

Suggested Profile Value: 170 (Customer Support) or 672 (iSupport).

Notes: Default Note Status

This profile sets the default status for notes.

JTF_PROFILE_DEFAULT_RESPONSIBILITY

This profile determines the default responsibility that can access HTML applications. For this profile option to work properly, you, as system administrator, must assign this responsibility to the application user and then set this profile value to the Responsibility ID.

Profile Level: Site.

Suggested Profile Value: 21782 (Customer Support) or 52456 (iSupport).

Default Escalation Status

Profile Level: Site.

Suggested Profile Value: Opened.

Default Escalation Level

Profile Level: Site.

Suggested Profile Value: 1.

Default Escalation Reason

Profile Level: Site.

Suggested Profile Value: Slow Progress.

Default Document Type

Profile Level: Site.

Suggested Profile Value: Service Request.

Default Reference Type

Profile Level: Site.

Suggested Profile Value: Escalation.

Escalation:Default Contact Type

This profile defines the default contact type for the new escalation document.

Profile Level: Site.

Suggested Profile Value: Customer.

Escalation:Default Notify (Y/N)

This profile sets the default value for the notify check box in the new escalation document.

Profile Level: Site.

Suggested Profile Value: Y.

Escalation:Default Customer Contact Point

This profile defines the default contact point for the new escalation document.

Profile Level: Site.

Suggested Profile Value: Phone.

Default New Note Type

Profile Level: Site.

Suggested Profile Value: General.

Service: Allow Knowledge Note Update

This profile defines if users are allowed to update Knowledge Management notes saved for a service request.

Profile Level: Site.

Suggested Profile Value: No.

Service: Default Knowledge Base solution Type

This profile controls the default solution type when a user enters the agent Knowledge Base contribution window.

Profile Level: Site.

Default Status for Knowledge Base Contributions

This profile sets the default status that would be set for contributions to the Knowledge Base.

Profile Level: Site.

Suggested Profile Value: Draft.

Maximum number of search results to be queried from the database

This profile value determines the maximum number of solutions that will be displayed as a result of a search in the Knowledge Base database. You can set this number to any optimal value. Typically, the quality of the information in the Knowledge Base and the quality of the query affects the number of results that must be viewed to find a solution. Experience determines the optimal number for each installation. The top scored results in the database will be displayed from the highest score to the lowest score.

Profile Level: Site.

JTF_TASK_DEFAULT_TASK_TYPE

This profile sets the default task type.

Profile Level: Site.

JTF_TASK_DEFAUT_TASK_STATUS

This profile sets the default task status.

Profile Level: Site.

JTF_TASK_DEFAULT_TASK_PRIORITY

This profile sets the default task priority.

Profile Level: Site.

CUG_TASK_FAILED_STATUS

This profile, used by the email workflow of Oracle CIC, sets the status name of the failed email tasks.

Profile Level: Site.

Suggested Profile Value: Failed.

CUG_TASK_SUCCESS_STATUS

This profile, used by the email workflow of Oracle CIC, sets the status name of successful email tasks.

Profile Level: Site.

Suggested Profile Value: Closed.

IEU: Queue: Forecasts

This profile defines if you want to display forecasts in the UWQ.

Profile Level: Site.

Suggested Profile Value: No.

IEU: Queue: Leads

This profile defines if you want to display leads in the UWQ.

Profile Level: Site.

Suggested Profile Value: No.

IEU: Queue: My Tasks

This profile defines if you want to display only the tasks owned by the user in the UWQ.

Profile Level: Site.

Suggested Profile Value: Yes.

IEU: QresType: MyWork

This profile defines if you want to display all work in UWQ.

Profile Level: Site.

Suggested Profile Value: Any of the following values:

- ALL WORK: All work assigned to the agent, team and groups
- ONLY USER'S WORK: Agent assigned work only.
- USER'S TEAM'S WORK: Work assigned to agent's teams.
- USER'S GROUP'S WORK: Work assigned to agent's groups

IEU: Queue: Opportunities

This profile defines if you want to display opportunities in the UWQ.

Profile Level: Site.

Suggested Profile Value: No.

IEU: Queue: Service Requests

This profile defines if you want to display service requests in the UWQ.

Profile Level: Site.

Suggested Profile Value: Yes.

IEU: Queue: Tasks

This profile defines if you want to display tasks in the UWQ.

Profile Level: Site.

Suggested Profile Value: Yes.

CSF: Default New tasks status

This profile defines the default status assigned to a new task.

CSF: Default "In planning" task status

This profile defines the default status that is assigned to tasks that are set to "In planning" in the Field Service Control Tower.

CSF: Default Assigned task status

This profile defines the default status that is assigned to tasks that are set to "Assigned" in the Field Service Control Tower.

CSF: Default Cancelled task status

This profile defines the default status that is assigned to tasks that are set to "Canceled" in the Field Service Control Tower.

CSF: Selected territories

This profile value is set automatically to store the territories selected and show them to the planner when the control tower is started.

CSF: The unit of measure for hour

This profile defines the setting of the unit of measure for hours. The value set should be defined in MTL_UNITS_OFMEASURE. Default setting is HRS (hours).

CSF: The unit of measure for minutes

This profile defines the setting of the unit of measure for minutes. The value set should be defined in MTL_UNITS_OFMEASURE. Default setting is MIN (minutes).

Customer Care: Default Territory for Contact Center

This profile sets the default territory for the Contact Center phone fields.

Customer Care: Default Outcomes for Interactions

This profile option sets the default outcome for interactions and activities.

Customer Care: Default Party Type

This profile option sets the default party type selected on the Contact Center.

Customer Care: New Contact Default Phone Type

This profile option sets the default phone type selected while creating a new contact.

Customer Care: Default Reason for Interactions

This profile option specifies the default reason to be set in the Contact Center for interactions and activities.

Customer Care: Default Results for Interactions

This profile option sets the default result for interactions and activities in the Contact Center.

Customer Care: Default Tab for Contact Center

This profile option sets the default tab that is displayed when a user opens the Contact Center.

Customer Care: Log Task Activities flag

This profile option sets the flag that controls the logging of interaction activities for tasks.

Customer Care: Number of Interactions Displayed in Contact Center

This profile option specifies the maximum number of interactions that can be displayed on the interactions tab of the Contact Center.

Customer Care: Critical Customer Check

This profile option sets the check based on which the criticality of the citizen is to be determined.

Customer Care: Default Relation for Person

This profile option specifies the default relation to be displayed while creating contacts.

Customer Care: Service Request Form Check

This profile option sets the service request form (Comms Service Request Form, Enter Service Request form, or Service Request Runtime Attribute form) to be called for creating service requests. Set this value to **Service Request Runtime Attribute**. This would ensure that the Contact Center is Oracle CIC enabled.

Contact Center: New Contact Default Address Type

This profile sets the default address type for new contacts.

Contact Center: New Contact Default Create Account

This profile if an account is to be created by default for the new contact.

JTF: Access All Calendars

This profile option allow the accessing of calendar belonging to other resources.

Terr: Multiple Winning Territories

This profile option sets the number of qualifying territories to return as winning territories.

JTF_PROFILE_DEFAULT_BLANK_ROWS

This profile sets the number of blank rows on the agency's UI forms (can be set to any integer greater than zero).

JTF_PROFILE_DEFAULT_CSS

This profile designates the default cascading style sheet to use for HTML display. Set it to jtfucss.css.

JTF_PROFILE_DEFAULT_NUM_ROWS

This profile designates the default the number of rows. Set this value to 10.

A

Oracle CIC Public APIs

This appendix presents information on the Incident Address Validation public API.

A.1 Oracle CIC Public Packages

Oracle CIC provides the following public API.

- CUG_VALIDATE_ADDRESS_PUB

The following table describes this API.

Table A–1 API Description

Name	Description
Validate_Incident_Address	This procedure allows third party Geographical Information Systems (GIS) to integrate with Oracle CIC to validate incident location while recording a service request. This integration may permit validation of incident location based on an exact match or the nearest intersection.

Procedure Specification

```
Validate_Incident_Address (
p_api_version           in   number,
p_init_msg_list         in   varchar2  default fnd_api.g_false,
p_commit                in   varchar2  default fnd_api.g_false,
p_incident_address_rec  in out
    CUG_ADDRES_CREATION_PKG.incident_address_rec_type,
p_return_address      in NUMBER,
x_return_status      out VARCHAR2,
x_msg_count          out NUMBER,
x_msg_data           out VARCHAR2,
)
```

Current Version

```
1.0
```

Parameter Descriptions

The following table describes the IN parameters associated with this API.

Table A–2   IN Parameters

Parameter	Data Type	Required	Descriptions and Validations
p_api_version	NUMBER	Yes	This must match the version number of the API. An unexpected error is returned if the calling program version number is incompatible with the current API version number (provided in the documentation).
p_init_msg_list	VARCHAR2	Yes	Default = FND_API.G_FALSE. If set to true, then the API makes a call to fnd_msg_pub.initialize to initialize the message stack. If set to false then the calling program must initialize the message stack. This action is required to be performed only once, even in the case where more than one API is called.
p_commit	VARCHAR2	Yes	Default = FND_API.G_FALSE If set to true, then the API commits before returning to the calling program. If set to false, then it is the calling program's responsibility to commit the transaction.
p_incident_ address_rec	VARCHAR2	Yes	The incident address captured during address validation at run time.
p_return_ address	VARCHAR2	Yes	Number of hits for a fuzzy address.

The following table describes the OUT parameters associated with this API.

Table A–3   Create Task Out Parameters

Parameter	Data Type	Descriptions
p_incident_address_rec	VARCHAR2	The incident address returned by the GIS system during address validation at run time.
x_return_status	VARCHAR2(1)	Indicates the return status of the API. The values returned are one of the following: ■ FND_API.G_RET_STS_SUCCESS Success: Indicates the API call was successful ■ FND_API.G_RET_STS_ERROR Expected Error: There is a validation error, or missing data error. ■ FND_API.G_RET_STS_UNEXP_ERROR Unexpected Error: The calling program can not correct the error.
x_msg_count	NUMBER	Holds the number of messages in the message list.
x_msg_data	VARCHAR2	Holds the encoded message if x_msg_count is equal to one.

A.2 Data Structure Specifications

The following data structure is used:

Name : incident_address_rec_type

PACKAGE name : CUG_ADDRESS_CREATION_PKG

```
TYPE incident_address_rec_type IS RECORD(
    location_id             NUMBER,
    address1                VARCHAR2(240),
    address2                VARCHAR2(240),
    address3                VARCHAR2(240),
    address4                VARCHAR2(240),
    city                    VARCHAR2(60),
    state                   VARCHAR2(60),
    postal_code             VARCHAR2(60),
    province                VARCHAR2(60),
    county                  VARCHAR2(60),
    country                 VARCHAR2(60),
    language                VARCHAR2(4),
    street                  VARCHAR2(50),
    house_number            VARCHAR2(50),
    apartment_number        VARCHAR2(50),
    building                VARCHAR2(50),
    position                VARCHAR2(50),
    po_box_number           VARCHAR2(50),
    street_number           VARCHAR2(50),
    room                    VARCHAR2(50),
    floor                   VARCHAR2(50),
    suite                   VARCHAR2(50),
    address_effective_date  DATE,
    address_expiration_date DATE,
    address_style           VARCHAR2(30),
    wh_update_date          DATE);
```

B

Navigation Paths

This appendix presents the navigation paths you may follow to open the setup windows indicated in this Implementation Guide.

Window Name	Navigation Path	Responsibility
Users	Security > User > Define	System Administrator
Find System Profile Values	Profile > System	System Administrator
System Profile Values	Profile > System	System Administrator
Note Types Lookups	Notes Setup > Note Type Setup	CRM Administrator
Application Utilities Lookups	Application > Lookups > Common	Application Developer
Source to Type Mappings	Notes Setup > Source and Note Type Mapping	CRM Administrator
JTF_RS_ROLE_TYPE Lookups	Setup > Role Type	CRM Administrator
Roles	Setup > Roles	CRM Administrator
People	Resource Manager > Maintain Employee > Employee	CRM Administrator
Define Teams	Resource Manager > Maintain Resources > Teams.	CRM Administrator
Define Groups	Resource Manager > Maintain Resources > Groups	CRM Administrator
Selection Criterion	Resource Manager > Maintain Resources > Import Resources	CRM Administrator
Task Types	Setup > Task Management > Task Types	CIC Administrator
Navigator (Territories)	Territory Manager > Territory Administration	CRM Administrator
Setup Qualifiers	Navigator (Territories) > Administration > Setup Qualifiers	CRM Administrator
Territory Details	Navigator (Territories) > Administration > Define Territory	CRM Administrator
Calendar Type Lookups	Calendar > Calendar Setup > Others > Define Calendar Types	CRM Administrator

Window Name	Navigation Path	Responsibility
Availability Types Lookups	Calendar > Calendar Setup > Others > Define Availability Types	CRM Administrator
Calendar Exception Category Lookups	Calendar > Calendar Setup > Others > Define Exception Categories	CRM Administrator
Calendar Exception Reason Lookups	Calendar > Calendar Setup > Others > Define Exception Reasons	CRM Administrator
Calendar	Calendar > Calendar Setup > Define Calendar	CRM Administrator
Define Shifts	Calendar > Calendar Setup > Define Shifts	CRM Administrator
Exceptions	Calendar > Calendar Setup > Define Exceptions	CRM Administrator
Assign Shift/Exceptions	Calendar > Calendar Setup > Assign Shift/Exceptions	CRM Administrator
Assign Calendar Resources	Calendar > Calendar Setup > Assign Resources	CRM Administrator
Customer Care Lookups	Setup > Customer Care Lookups	CIC Administrator
Service Request Statuses	Setup >Service Requests > Request Statuses	CIC Administrator
Service Request Types	Setup >Service Requests > Request Types	CIC Administrator
Service Request Severities	Setup >Service Requests > Request Severities	CIC Administrator
Service Request Urgencies	Setup >Service Requests > Request Urgencies	CIC Administrator
Service Request Problem Codes Lookups	Setup >Service Requests > Problem Codes	CIC Administrator
REQUEST_RESOLUTION_ CODE Lookups	Setup >Service Requests > Resolution Codes	CIC Administrator
MESSAGE_ACTION_ REQUEST Lookups	Setup >Service Requests > Action Request	CIC Administrator
Customer Profile Setup	Setup > Customer Management > Customer Profiles	CIC Administrator
Relationship Plans Group Lookups	Setup > Relationship Plans > Define Plan Groups	CIC Administrator
Action	Setup > Relationship Plans > Events > Define Action	CIC Administrator
Process Definitions	Setup > Relationship Plans > Events > Define Process Definitions	CIC Administrator
Messages	Application > Messages	Application Developer
New Plan	Setup > Relationship Plans > Define Relationship Plans	CIC Administrator
Enable Relationship Plans - Setup	Setup > Relationship Plans > Enable Relationship Plans	CIC Administrator
Dependency Types for Task Lookups	Task and Escalation Manager > Setup > Define Dependency Types	CRM Administrator
Rules Associated with a Given Task Type	Task and Escalation Manager > Setup > Define Rules	CRM Administrator

Window Name	Navigation Path	Responsibility
Escalation Reasons Lookups	Task and Escalation Manager > Setup > Define Escalation Reasons	CRM Administrator
Contact Types Lookups	Task and Escalation Manager > Setup > Define Contact Types	CRM Administrator
Escalation Levels Lookups	Task and Escalation Manager > Setup > Define Escalation Levels	CRM Administrator
Reference Codes for the Tasks Lookups	Task and Escalation Manager > Setup > Define Reference Type	CRM Administrator
Submit a Request	Requests > Run	System Administrator
Task and Escalation Status	Setup > Task Management > Task Status	CIC Administrator
Reference Codes for the Task Lookups	Task and Escalation Manager > Setup > Define Reference Type	CRM Administrator
Responsibilities	Security > Responsibility > Define	System Administrator
CUG_SR_TYPE_ATTRIBUTES Lookups	Setup > Service Request > Request Attributes	CIC Administrator
Application Object Library Lookups	Application > Lookups	Application Developer
Service Request Attribute Configuration	Setup > CIC Configuration Definition > Service Request Type Attributes	CIC Administrator
Service Request - Task Type Attribute Configuration	Setup > CIC Configuration Definition > Service Request Task Attribute Details	CIC Administrator
Task Type Attributes Configuration	Setup > CIC Configuration Definition >Task Type Attributes	CIC Administrator
CUG Task Type Attributes Lookups	Setup > Task Management > Task Type Attributes	CIC Administrator
Task Type Attributes Configuration	Setup > CIC Configuration Definition > Task Type Attributes	CIC Administrator