Oracle® Citizen Interaction Center

Concepts and Procedures

Release 11*i*

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Oracle Citizen Interaction Center Concepts and Procedures, Release 11*i*.

Part No. A92140-01

Contents

2   Basics of Oracle Citizen Interaction Center

3   Managing Citizen Interaction

4   Managing Service Request Resolution

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Preface

Audience for This Guide

Welcome to Release 11*i* of the Oracle Citizen Interaction Center Concepts and Procedures.

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 use Oracle Citizen Interaction Center.

This manual contains the following four chapters:

Chapter 1, "Overview of Oracle Citizen Interaction Center"

This section provides an overview of Oracle Sales for Communications and its components. It explains the key concepts, features, and functions of Oracle Citizen Interaction Center.

Chapter 2, "Basics of Oracle Citizen Interaction Center"

This chapter present information on the basic tasks you can perform in Oracle CIC.

Chapter 3, "Managing Citizen Interaction"

This section presents information on managing citizen interaction using Oracle Citizen Interaction Center. Detailed procedures for performing a wide variety of citizen management related tasks are presented in this chapter.

Chapter 4, "Managing Service Request Resolution"

Oracle CIC improves operational efficiency of agencies by rapidly processing service requests using predefined activities. This chapter discusses the task related functions supported by Oracle CIC.

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.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any representations regarding the accessibility of these Web sites.

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.

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*MetaLink*, you can obtain information and advice from technical libraries and forums, download patches,

download the latest documentation, look at bug details, and create or update TARs. To use 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 (Oracle CIC) and it's 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 federal, state and local government and their departments (referred to as government agencies from this point onwards) to provide citizens with multiple channels of interaction. Citizens demand the ability to easily contact them 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 contact with government agencies. 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 manages the following processes:

- 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 rising expectations for improved public service, at the same time managing 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 Key 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. The Web or the Customer Service Representative (CSR) in the call center are the first line of assistance for the citizen allowing the subject matter experts in the government agency to work more efficiently on their tasks instead of answering citizen queries and logging service requests. Oracle CIC enables:

- Government agencies 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.

1.3.1 Citizen Management

Oracle CIC establishes web access as well as a full-fledged call center environment to improve citizen interaction with government agencies. Web sites provide access to databases that the citizens can query to obtain answers to their day-to-day issues. This provides a self-service environment to citizens. If the information is not available, or is not appropriate, citizens can use an access number to contact the call center (the citizen will call into a unified call center for all agencies) where they can log service requests irrespective of the government agency dealing with the issue.

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:

Dashboard   The Dashboard 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   Oracle CIC provides a self-service environment (a home page)
for getting informations. The home page contains news from 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.

Oracle CIC allows citizens to log in and identify themselves or use the anonymous
log in facility.

1.3.2 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 to gather appropriate data. It allows
CSRs to record citizen information and attempt problem resolution to solve citizen
issues in the very first interaction.

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.

A public instance of the knowledge management database is available from the self-service environment. This database, however, will be a subset containing only the data marked as public.

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

1.3.3 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 using the business rule monitor.

- Field Service scheduling, dispatching, viewing and monitoring.

- Tracking task status and closing the service request when all the tasks for the service request are successfully completed.

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 effectively cater to the citizen's needs.

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.

- View details by drilling down to the document attached to an interaction activity.

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 Dashboard

The Dashboard 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.

Some of the profile check you may want to implement in Oracle CIC includes:

- Critical Citizen Y/N.

- Number of Outstanding Service Requests.

- Number of Escalated Tasks.

The Dashboard tab provides a panoramic view of citizen's transactions.The profiles enable 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 CIC allows government agencies to define rules governing the criticality of their citizen base. A threshold level can be defined for different profile checks. When the threshold level is crossed, Oracle CIC 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

A 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 further research, and if necessary, to log a service request.

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 their status. The system closes the service request when all the tasks are successfully completed.

2

Basics of Oracle Citizen Interaction Center

This chapter present information on the basic tasks you can perform in Oracle CIC. The following topics are discussed in this chapter:

- Accessing the Oracle Citizen Interaction Center
- The Contact Center
- Understanding Profiles
- Universal Work Queue and Oracle CIC
- Understanding Service Requests
- Understanding Field Service

2.1 Accessing the Oracle Citizen Interaction Center

At the core of the Oracle CIC is the Contact Center that provides CSRs with instant access to citizen information. A number of tabs accessible from the Contact Center present information about the citizen. The Service Request tab allows the CSR to create service request on behalf of the citizen. Buttons in the Contact Center allow you to enter citizen information and provide signals in acceptance of new calls.

To access the Contact Center:

1. Log-in to Oracle Applications.

2. Select the Citizen Interaction Center responsibility.

   The Navigator window appears.

3. Use the following navigation path to open the Contact Center window:

   Citizen Management > Contact Center/Service Request

2.2 The Contact Center

The Contact Center comprises a header region and a set of ten tabs.
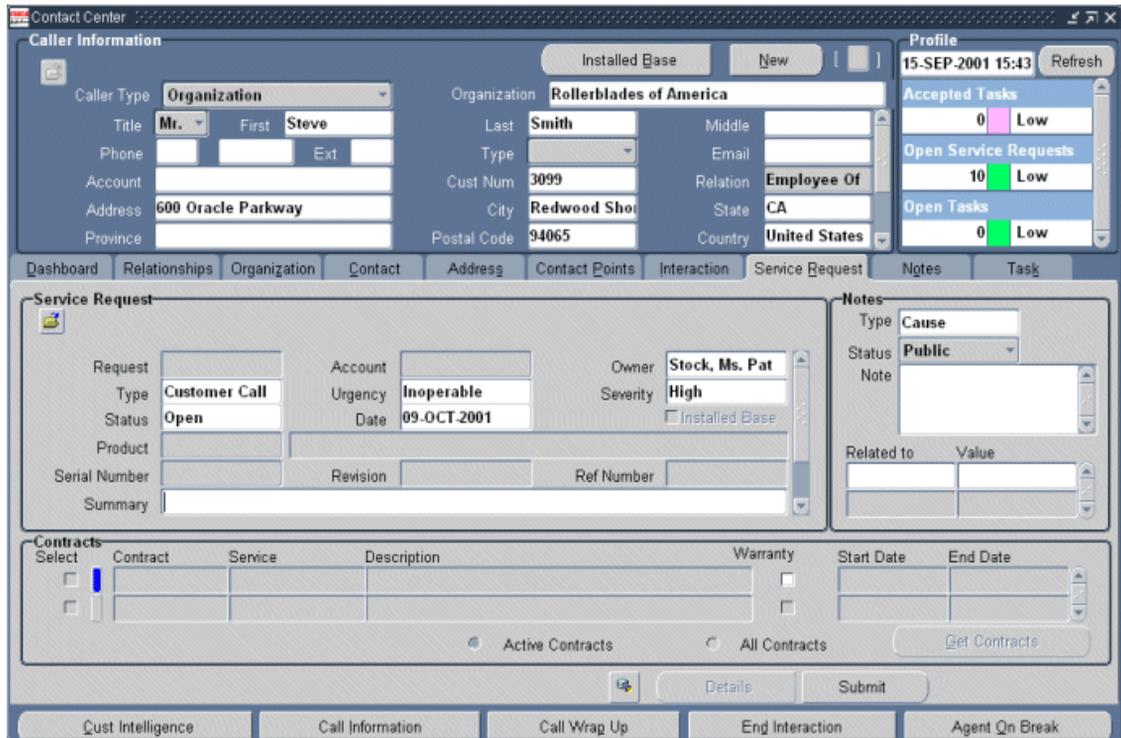
The contacts can call on their own behalf or on behalf of a person or organization. The information displayed by the CSR would depend on the caller.

The tabs available from the Contact Center present important information about the citizen.

2.2.1 Tabs in the Contact Center

The following tabs are accessible from the Contact Center:

Dashboard   This tab provides a comprehensive overview of critical citizen data, which familiarizes the agent with the citizen. It displays concise citizen information pertaining to tasks and service requests. You can also tell at a glance whether a citizen is critical.

Relationships   This tab displays relationships that have been defined for the citizen selected in the Caller Information region. You can create new relationships from this tab and inactivate existing relationships by end-dating them.

Organization   This tab is accessible only if you are entering information (alias, SIC, line of business, etc.) about an organization.

Contact   This tab presents information such as pronunciation of the name, nickname, etc.

Address   This tab allows you to view, create and update citizen or organization addresses.

Contact Points   This tab displays the contact points associated with the citizen, including the contact method for the contact point, such as phone number, fax number and email address. From this tab you can set the primary contact point for the citizen.

Interaction   This tab displays the last n interactions of the citizen (where n is a number specified by a profile option). This tab lists the citizen interactions with their associated activities. From this tab you can drill down to view details of an interaction.

Service Request   This tab allows you to create a service request for the citizen or organization. From the Service Request tab, you can access Knowledge Base, a rich repository of solution sets, to resolve the problem during the very first citizen interaction.

Notes   This tab helps you create notes on the current citizen interaction. From this tab, you can access existing notes for the service request you have queried up.

Task   This tab helps you create, update, assign and view previous tasks for the citizen. Previous tasks performed for the citizen are listed in the spread-table at the top of the tab, while details of the selected task are displayed in the fields below it.

Oracle CIC automatically creates the tasks for resolving a service request based on the rules specified for your configuration. You may use this tab to manually create tasks or query up a task created by the system. For example, you may want to manually create a task for a service request that was cancelled.

2.2.2 Buttons in the Contact Center

The following buttons are available in the Contact Center window irrespective of the tab that you are on:

Cust Intelligence   Use this button to access the reporting module of Oracle Citizen Interaction Center.

Call Information   Use this button to open the Call Information window where you can view call (IVR) parameters such as ANI, DNIS, Service Request Number etc. which the citizen enters while calling up the call center.

This button will be active only if the call center is Oracle Telephony enabled.

Call Wrap Up   Use this button to open the Call Wrap Up window where you can enter information about the outcome of the interaction with the citizen as well as other call wrap up information. This will automatically end the interaction.

End Interaction   Use this button to terminate the citizen interaction if you have no wrap up information to enter into the Call Wrap Up window. Pressing this button to end the present interaction signals that you are ready to accept new calls.

Agent On Break   Use this button to signal that you are on a break and are not available to accept calls. The button label changes to Agent Off Break. When you are ready to accept new calls, press this button to signal that you are back from the break.

2.3 Understanding Profiles

Citizen Profile information is displayed on the Profile region of the Contact Center. It summarizes citizen information and also indicates if a citizen is critical. It may contain information such as the critical citizen status and various other attributes. The indicators are flagged by appropriate ratings and colors which give instant visual clues to the agent and enable them to engage appropriately with the citizen. You can drill down from a key indicator to the detail list and eventually to the original interaction to make a more comprehensive assessment of the citizen's situation.

The profile entries appearing in the citizen profile are typically set up by a system administrator, and contain a set of predefined checks. These checks are configurable, as are the actual range values and value definitions. The check results are displayed by utilizing the Profile Engine, which is a concurrent program.

The Profile Engine, as part of the Profile module, runs periodically to check and store changes to citizen profiles. The engine is a server-side PL/SQL program which may be run as a concurrent program or by clicking the Refresh button.

2.4 Universal Work Queue and Oracle CIC

The Universal Work Queue (UWQ) provides you a unified and common view of work by simplifying multi-media access. The UWQ channels all the work items assigned to you by the supervisor and reduces the complexity of working across service channels and tasks.

You can access and view all your work assignments through the UWQ. Media items include inbound and outbound calls, and e-mail. When you access the UWQ, all work items are indicated in My Work, which is the portal for selecting work. The total number of work items for each work type is shown in the Count column. When you select a work item, UWQ launches the appropriate window for the media or task. The Get Work button allows you to work within the same work type by gathering the next item to be worked on.

To access work through UWQ:

1. Log-in to the Oracle CIC.

2. Select Universal Work Queue from the Navigator.

3. Select the work type to handle from My Work. The associated work items are shown in the right pane of UWQ.

4. Select a work item.

5. Click the Get Work button.

> **Note:** UWQ can be accessed from the Contact Center also. To access the UWQ from the Contact center, choose the Universal work Queue option from the Tools menu.

2.5 Understanding Service Requests

Citizens contact government agencies via phone, e-mail, or web when they experience problems for which government agencies provide solutions. In response, you, as the service representative, initiate a service request on behalf of the citizen.

Oracle CIC allows the agency to enter and manage citizen requests for service assistance. A service request is a report of a specific problem that requires the agency's assistance to resolve.

Service request functions as the central reaction point for a resource(s) who needs to respond to a citizen request. An interaction between citizen and service representative results in either an immediate resolution of the problem or a work assignment to qualified individuals. The service request is integrated with a powerful knowledge management solution so that you can leverage existing knowledge within the agency and build your solutions knowledge base by channeling information you collect while responding to service requests.

A service request describes all the necessary information about the citizen problem required to determine the best plan of action to resolve the issue effectively. While logging service requests, you can assign an urgency and severity status for each request. An urgency reflects the service request from the caller's view of the event, while the severity reflects the service person's interpretation of the event.

While configuring Oracle CIC, a government agency determines what information is necessary to resolve the service request. This determination is made based on the service request type being configured. For example, for an abandoned vehicle, the city needs to know the make, model, color, and the plate number and state. While configuring, the agency will also define the tasks that need to be automatically created when a service request of this type is submitted.

You can record all citizen interactions for each service request by logging all incoming and outgoing calls as well as associated details.

As you change information about service requests and actions, the service request maintains an audit history of the changes. For example, if you change the status of a service request from Open: Unassigned to Open: Assigned, the Service request records the old and new status values, as well as the user who made the change and the date.

2.6 Understanding Field Service

Field Service assists service agencies in the service process from taking the citizen call to fixing and reporting on the problem. At the core of Field Service is the Dispatch Center which allows the field service dispatcher to plan, dispatch, and monitor all field service activities, ultimately ensuring that the right person is in the right place at the right time.

The Dispatch Center is a one stop planning area where you can plan, dispatch, and monitor tasks for service representatives out in the field. A planner can view all incoming tasks within his or her responsibility and then assign these tasks to create a trip for each service representative. A trip includes all the tasks assigned to a service representative within a working day. It comprises a start time and location, which is defined as a departure task, and an end time and location, which is defined as an arrival task. All tasks are scheduled between the departure and arrival tasks. In addition to dispatching tasks, the Dispatch Center allows you to monitor service representative's progress, and report on tasks and schedules using the plan board and gantt. You can also make last minute changes to schedules and view your service group's status and location.

In the Dispatch Center screen, you can view all incoming tasks, citizen information, planned start and end dates, and actual scheduled times for a selected citizen.

Features include:

- Bolded Tasks: This indicates that a task is ready for planning.

- Advise Button: Opens the Assignment Manager screen so you can assign a single task using selection criteria from either the Assignment Manager or Scheduler.

- Auto-Assign Button: Automatically assigns a task or multiple tasks using the selection criteria from Assignment Manager or Scheduler.

The tab pages allow you to view trips, schedules, reports on tasks, and monitor progress. The Dispatch Center includes the following tabs:

- Plan Board.

- Gantt.

Plan Board Features

The Plan Board contains a grid populated with the service representative's name, departure and arrival times, scheduled tasks for the day, as well as the citizen's address. From the plan board you can:

- View service representatives' trips for the day.

- Access service representatives' calendars.

- Access service request or task source details.

- Assign task.

- Report on performed tasks.

- Optimize trips.

- Send Messages.

Gantt Features

The Gantt chart view is a quick graphical overview of the scheduled tasks based on time. The date range shown by default is two days before the actual date and two weeks ahead of it. The date range is adjustable. From the Gantt you can:

- View daily schedules with tasks shown in green or red (escalated) bars, travel time transparent, and shifts in yellow.

- View progress on tasks for service representatives.

- View predicted schedules.

- View task description.

- Move tasks from one service representative to another.

- Access service request details.

3

Managing Citizen Interaction

This section presents information on managing citizen interaction using Oracle CIC. Topics discussed in this chapter include:

- Key Business Processes

- Creating Citizen Information

- Viewing Citizen Information

- Viewing Citizen Profile and Drilling Down to Details

- Updating Citizen Details

- Working with Addresses

- Creating and Updating Relationships

- Viewing and Updating Contacts

- Viewing Interaction History

- Creating Service Requests

- Finding Service Requests

- Creating and Maintaining Notes

- Searching Knowledge Base

- Managing Critical Citizens

- Using Relationship Plans

- Wrapping up Calls

3.1 Key Business Processes

The following is a partial list of the Customer Management tasks you can perform using Oracle CIC. These are explained in the sections that follow.

- Create a new organization/citizen.

- Manage citizen information.

- Create, view, and update addresses.

- Create, view, and update contact points.

- Create new relationships.

- View interaction history.

- Create and view Service Requests

- Create and view notes.

- Drilldown to the service request details.

- Create a task.

- View the customer profile.

3.2 Viewing Citizen Information

You may view caller details from the search window or by using the list of values available in the Contact Center.

To view citizen information:

1. Click the Find button on the toolbar to open the Customer Search window for querying citizen details. Select Person or Organization as the Caller Type. Organization is the default entry if no choice is made.

2. Enter the name of the organization, or choose the name from the list of values. Any field in the Basic tab can be used to find the citizen, such as contact, phone number, account number, address. You can also use the advanced search by opening the Advanced tab.

3. Click Search to display the results of the search.

4. Highlight the line displaying your citizen in the Results region and click OK.

   The Contact Center window, displaying the relevant citizen information, opens.

5. To find citizen information using the list of values in the Contact Center window, do the following:

   a. Choose a caller type of Person or Organization.

   b. Enter a value in the name, phone, account or name fields to choose a caller or company from the list of values.

      All additional information such as relationship, address, party number are automatically displayed. In addition, all the tabs on the Contact Center window will also display the appropriate information.

6. If you need to update citizen information that appears in the Caller Information region, you must do so in the appropriate tab, such as the Contact Points tab, Contact tab or the Address tab.

3.3 Creating Citizen Information

Use the following procedure to enter information about a new citizen and to create an account.

To create a new citizen and an account:

1. Open the Contact Center.

2. Click New. The Caller Information window appears.

3. Choose a caller type in the Caller Type field.

- To create an organization (G2B citizen), select Organization as the caller type.

- To create details of a citizen (G2C citizen), select Person as the caller type.

- To create a citizen as a contact for another G2C citizen, select Caller as the caller type.

The fields available to you depend on your selection in the Caller Type field. All selections result in the display of Phone, Party, Account Name and Email fields. If you select Organization as the Caller Type, the Organization and Relation fields are displayed. If you select Person or Contact, the fields related to the caller's name are displayed.

4. If you are creating a new caller for a citizen, enter a relationship (for example, "spouse of"). Also choose the party you want to associate with the caller. You may specify the appropriate relationship from the Relation tab later.

5. Optionally enter an email address in the Email field.

6. Select the Account check box if you want to create an account for this caller.

7. The Address field is actually a Flexible Address format. Once you click on the field, the address flexfield window will appear where the user can enter all the address attributes such as Address Lines, City, State, Zipcode. The address flexfield attributes are based on what you define in the setup for each country. The default for the New window is US. Refer to the *Oracle Citizen Interaction Center Implementation Guide* for details on setting up the address flexfield.

8. Optionally enter effective dates in the Effective From and Effective To fields.

9. Save your work.

The system automatically generates and assigns a Party Number to the caller. If the Account check box is selected, an account is created for the citizen.

> **Note:** If you leave a field empty when creating a new organization, contact or caller, you must requery the record and navigate to the appropriate tab to update the empty fields.

3.4 Updating Citizen Details

Citizen interaction at the contact center may be associated to multiple activities such as updating contact information and logging service requests and creating tasks. Use the following procedures to update details of citizen interactions.

To update citizen details:

1. In the Contact Center, query up the caller details you want to update.

2. The header region displays only the identifying address of the party. The query considers the following hierarchy when retrieving the identifying address, phone number and email address to display in the header region:

    ■   The query first looks at the subject, which is the caller.

    ■   If there is no primary address, phone number or email address at the subject level, then the object, or party name, is checked for a primary address, phone number or email address.

    ■   If there is no primary address, phone number or email address at the object level, then the relationship is checked.

3. If, during the caller creation process you forgot to enter the address, phone number or email address, then the field will be displayed as null. To update a null field, you must navigate to the appropriate tab and enter information.

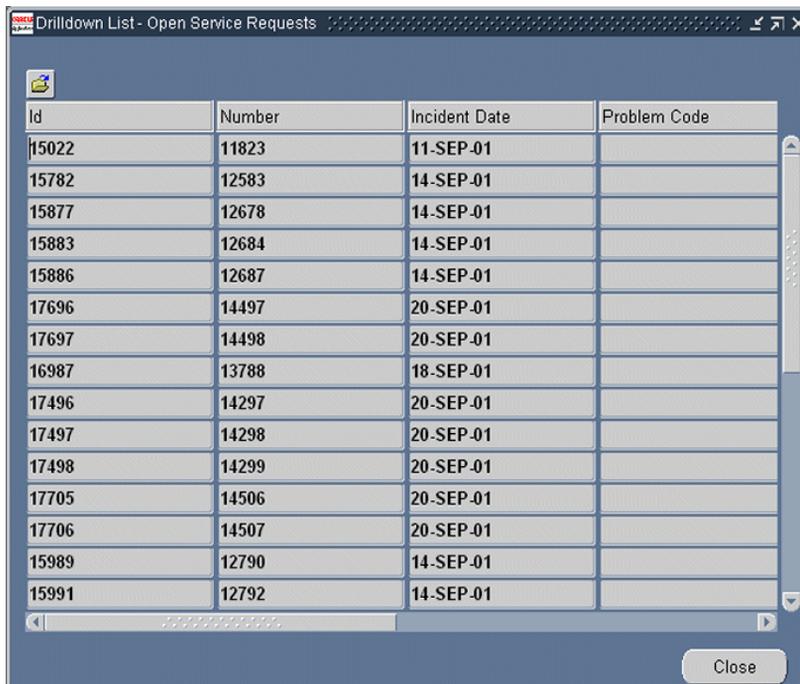   You will see the changes when you requery the caller.

3.5 Viewing the Citizen Profile and Drilling Down to the Details

The Customer Profile summarizes citizen information and also indicates if a citizen is critical. The profile entries appearing in the citizen profile are typically set up by a system administrator, and contain a set of predefined checks. These checks are configurable, as are the actual range values and value definitions. The check results are displayed by utilizing the Customer Profile Engine, which is a concurrent program.

The citizen profile information is displayed in the upper right hand corner of the Contact Center. Click Refresh in the Profile region to view the latest profile information for the citizen.

To view the citizen profile and drill down to the details:

1. Double-click on a key indicator in the profile region of the Contact center. Oracle CICpresents a summary list of that profile check. For example, double-clicking on Open Service Request (a key indicator) displays the drilldown list showing all open service requests for the selected citizen type. This list displays information such as the service request number, incident date, problem code and resolution code.

2. Double click on any line in the summary list. Oracle CIC displays the appropriate window containing details of the selected line.

3.6 Viewing the Dashboard

The Dashboard tab of the Contact Center is an extension of the citizen profile. It provides a comprehensive overview of critical citizen data, which familiarizes you with the citizen. It displays concise citizen information pertaining to various profile checks. You can also tell at a glance whether a citizen is critical.

Information on the Dashboard tab helps to categorize profile checks. For example, all service request related profile checks may be grouped together under the Service Requests category.

To view the dashboard:

1. Open the Dashboard tab from the Contact Center.

2. Select to view the information for an organization, person, relationship or caller in the View By drop-down list.

3. You can view further details on any of the indicators by two methods:

   - Select an indicator and then click View Details.

   - Double-click on the indicator.

   For example, to view a list of all accepted tasks, select the Accepted Tasks indicator and then click View Details. A window listing summary information on all the accepted tasks appears. Double-click on any given record to view further information about a specific task.

4. Click Refresh to refresh the indicator values. This runs the Customer Profile Engine for the current citizen and displays the latest details.

5. The Last Refresh date shows the last time the profile engine was run for this citizen.

3.7 Working with Addresses

The Address tab allows you to view, create and update address information and address usage details for a site. It also allows you to choose the primary address site for each address usage. You will be able to create a new address for a citizen by choosing from available locations or creating a new one.

The View By drop-down list on the Address tab allows you to view addresses by Citizen or Contact.

The Address tab comprises three distinct regions:

Party Site Information region

This region, located at the top of the Address tab, allows you to view, create and update site information for the current citizen. You can create a new address for a citizen by choosing from the available locations or by creating a new location.

Usage Region

This region, located below the Party Site information region, provides you the ability to view, update and create multiple usage for a particular site.

Primary Usage Region

This region, located next to the Usage region, allows you to set an address as primary for each site usage.

To query all inactive addresses, you can check the Show Inactive check box.

To create new addresses:

1. In the Contact Center, query up details of the caller whose address details are to be modified.

2. Open the Address tab in the Contact Center.

3. Click the New toolbar button.

4. In the Status field, select Active.

5. In the Site Name, select an existing site, or enter a new location.

6. In the Address 1 field, enter the address for the site, if you have specified a new location.

7. Enter values in the remaining address fields.

8. In the Usage region, select the usage for the address you have entered.
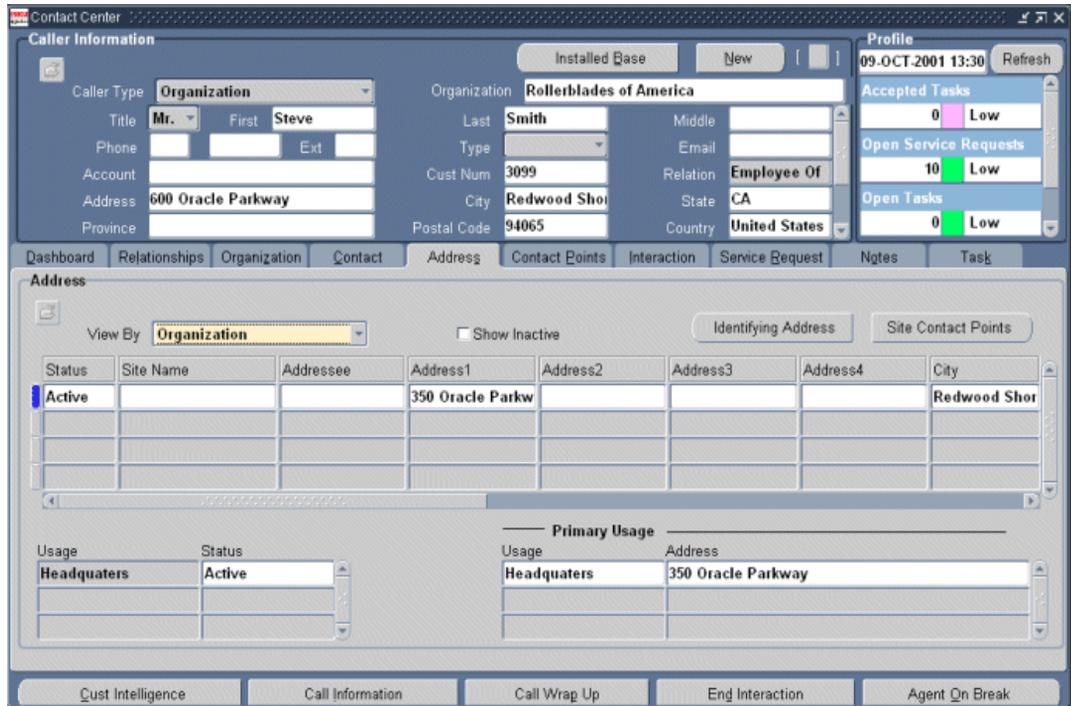
9. In the Primary usage field, select the primary usage for the site indicated by the address.

10. Save your work.

11. Press the Site Contact button Points button to view, create or update a new contact point for the selected location.

3.8 Creating and Updating Relationships

The Relationships tab in the Contact Center window displays relationships that have been defined for the citizen selected in the Caller Information region.

You can create new relationships from this tab and inactivate existing relationships by end-dating them. Since the Relationship Tab is a folder block, you can use the folder functionality to personalize the appearance such as hide fields and move the position of the fields.

The View By drop-down list allows you to view contact points for a citizen or contact. The citizen could be a person, an organization, or a contact. If the Citizen is an Organization, then the contact is always a party relationship. However, if the citizen is a person, then the contact could be a relationship or a person (the citizen could call on his/her own behalf). On the Relationships tab, the View will be restricted to citizen data (using the Customer filter) if the contact is a party relationship.

To create a new relationship:

1. Open the Relationship tab in the Contact Center.
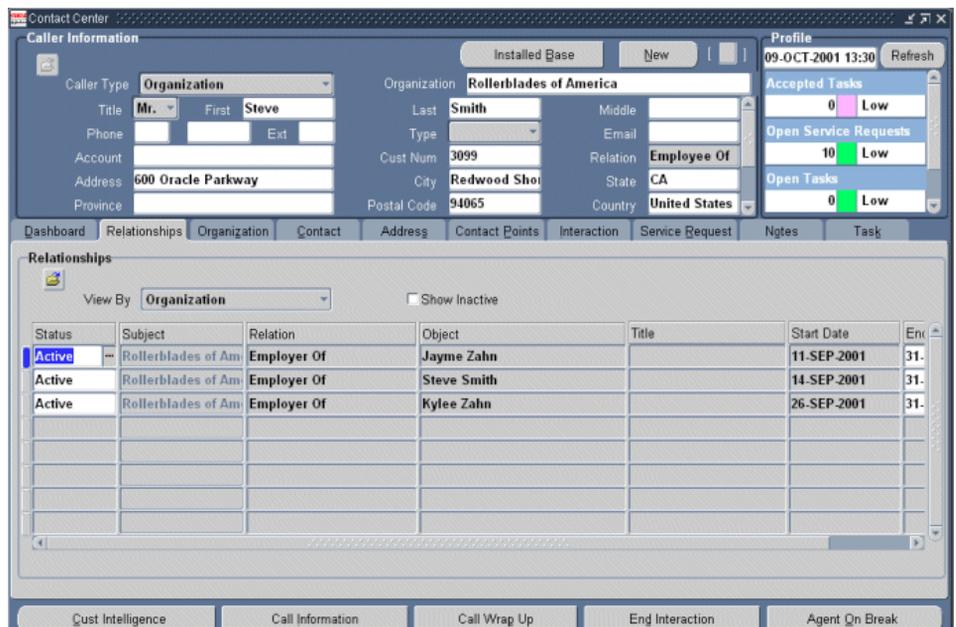
2. The filters available for displaying relationship details depend on the caller type you have selected. From the View By drop-down list, select one of the following:

   - Person to list all the relationships of the current citizen to other citizens and/or organizations.

   - Organization to display all the relationships of the caller to other citizens and/or organizations.

   - Caller to view the contact's relationship with organizations and/or citizens.

3. Select Active from the Status list of values. Data in the subject field is displayed by default.

4. Select a relationship type from the list of values in the Relation field.

5. Select the organization or citizen who is to be related to the subject in the Object field.

6. Optionally select the job role of the object in the Title field.

7. The Start Date field defaults to today's date. You can override this value.

8. Optionally enter a value in the End Date field.

9. Save your work.

To update an existing relationship:

1. Open the Relationship tab in the Contact Center.

2. The filters available for displaying relationship details depend on the caller type you have selected. From the View By drop-down list, select:

   - Person to list all the relationships of the current citizen to other citizens and/or organizations.

   - Organization to display all the relationships of the caller to other citizens and/or organizations.

   - Caller to view the contact's relationship with organizations and/or citizens.

3. Update the Status, Relation, Object, Title and/or Date fields as needed.

4. If you need to inactivate a relationship, enter a date in the End Date field. You would also need to update the status to Inactive.

3.9 Viewing and Updating Contact Points

Contact points are all the communication touch points for a party. They include phone, fax, email, web address (url), telex and EDI.

The View By drop-down list allows you to view contact points for a citizen or contact. The citizen could be an individual or a citizen acting on behalf of an organization.

From the Contact Points tab you can view, update and create contact points for a citizen. You can also set the primary contact point for each contact method. All contact methods are seeded values (phone, fax, email, web, and telex). In order to

create a new contact point, you can choose a contact method and then enter the contact point value in the Value field.

To create a contact point:

1. Open the Contact Points tab on the Contact Center.

2. Click the New toolbar button to open a new row for entering contact point data.

3. Select the contact method from the list of values.

For contact methods other than phone, only the Value field is enabled. For contact type phone, all the fields relating to phone are enabled. They include:

- Phone Line Type.

- Country Code.

- Area Code.

- Value.

- Extension.

4. Enter the appropriate data for the contact point you are defining.

5. The Primary Contact Points region allows you to define details of the primary contact point for the citizen. Enter the appropriate values in the fields in this region.

6. Save your work.

3.10 Viewing Interaction History

The Interactions tab presents a 360 degree view of all citizen interactions. The tab displays the last n interactions (where n is a user defined number specified using a profile option), and their details.

An interaction can have multiple activities associated to it. For example, a call from a citizen would be displayed as an inbound call. Interaction history will record if a service request is created and tasks assigned.

Besides viewing details of recent citizen interactions, you may drill down to view activities to which documents are associated.

The Interactions tab comprises two distinct regions: Summary and Detail. The Summary region contains a tree structure displaying customer interactions and their associated activities as sub-nodes on the tree. The Details region contains details of the record selected in the Summary region.

All of the values on this tab are display only and cannot be updated.

To search for a specific interaction:

1. In the Contact Center window, select the caller whose interaction history is to be viewed.

2. Open the Interaction tab.

3. Click the All Interactions button.

4. The Customer Interaction History window opens. From this window, you can search for interactions or activities.

5. Enter appropriate search criteria, such as a range of dates, and click Search.

To drilldown to an associated document from an activity:

6. In the Activity Details region, find the activity you want to drill down to.

7. Double-click on the document number. For example, if you are drilling down to a service request, then double-click on the service request number. The Service Request window, displaying the details, opens.

3.11 Creating Service Requests

Service requests initiate the actions required to solve a citizen problem. The citizen information is validated using the contact center and then the CSR can open the Service Request window to log a citizen request for assistance.

From the Service Request tab, you can access the Knowledge Base, a rich repository of solution sets. This could help to resolve a problem during the very first citizen interaction. The embedded knowledge management module, leveraging the Oracle Inter-Media technology, enables you to search, capture, and manage problem

resolution information from existing service requests. Multiple search capabilities allow you to find information easily.

You, as a CSR, can create service requests on behalf of the citizens contacting your agency. In some cases, the citizen may wish to remain anonymous. In such cases, you would query up data into the Contact Center with user details set up specifically for this purpose. For example, your agency may have a user such as Jane Doe with preconfigured address and contact information for the city as the default.

For citizens willing to divulge their identity, you must start by selecting/creating citizen data in the Contact Center.

To create a service request:

1. Navigate to the Service Request tab in the Contact Center.

    The Owner, Service Request Type, Severity, Urgency, Status, and Date fields default from the profile options. You may change these values, if needed.
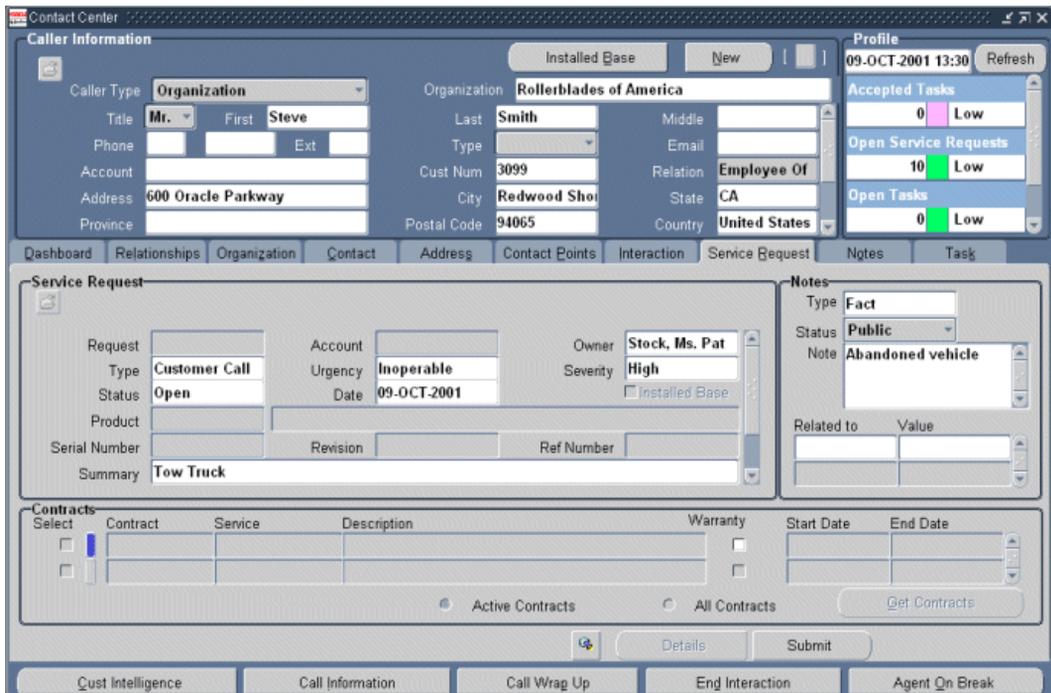
2. Enter a brief description of the problem (for example, tow abandoned vehicle) in the Summary field. This field is mandatory.

3. Optionally choose a problem code in the Problem field and a resolution code. These codes can facilitate service request activity reporting.

4. Click Submit. The system generates a service request number and displays it in the Request field. You can give this number to the citizen as reference. Saving the Service Request at this stage will not create a service request number.

Note: Anonymous citizens should be asked to keep track of their service request numbers. This is the only identifier that you can use to find such service requests.

Service Request Runtime Attribute Capture form opens.

5. Select the Capture Address Details check box, if the incident address is to be captured. On selecting this check box, Oracle CIC displays a list of values from which you must select the address style. These styles would reflect the local address standards.

Note: You can configure Oracle CIC for each service request type to copy the primary address of the citizen as the default incident location address. If the primary address is the same as the incident location address, you need not capture it again.

The Address window opens. This is a Service Request Attribute capture window specific to Oracle CIC. This window allows you to capture incident address details. Incident address is the address where the problem has occurred. The contexts in which incident addresses can be captured are defined by your administrator (using the Address flexfield). For example, you may have two contexts: EXT (Exact Address Style) and IXN (Intersection Address Style) where EXT is used to record an exact location of the incident while IXN is used to capture a location in relation to its nearest cross street.

6. In the Address window the Context Value shows the context for the address (for example, EXT or IXT).

   a. Enter appropriate values in the address fields. The information captured would depend on the settings specified by your administrator.

   b. Click OK to return to the Service Request Runtime Attribute Capture form.

      The data entered in the Address window is concatenated into a single string. Service Request Runtime Attribute Capture form would display this string in the Incident Address field.

7. Select the Address Validate button on the Service Request Runtime Attribute Capture form. This would validate the address string against the GIS database, if implemented.

   Note: If the address of a "genuine service request" is not found in the database, you must transfer the call to a supervisor who may override the address and submit a request to modify the address in the GIS database. The supervisor will use the Override Address Validation and Capture Address Details check boxes to capture the address. These check boxes are not available to CSRs.

8. Enter Service Request attributes based on the set of questions presented in the in the Service Request Runtime Attribute Capture form. For example, for an abandoned vehicle, the set of questions asked by the Sanitation Department could be as follows:

   ■ Is the vehicle blocking an intersection?

   ■ Make

   ■ Model

   ■ Color

   ■ State: Plate

   ■ Number

9. Save your work.

Duplicate Checking Process

When a service request is committed to the database, Oracle CIC initiates the duplicate checking process. Based on the service request type, the incident address and specific timing and configuration attributes, Oracle CIC will try to identify potential duplicates. For example, a citizen calls in an abandoned vehicle from an incident location. A couple of hours later, another citizen calls in an abandoned vehicle from the same incident location. In such cases, Oracle CIC will notify a responsible party to investigate if the second service request is a duplicate. For this purpose, Oracle CIC will compare predefined attributes (for example, make, model, and color) against other similar service requests logged within a predefined period of time (for example, one week) from the same incident location.

3.12 Finding Service Requests

Use the Service Request Search window to retrieve service requests from the database. Oracle CIC provides two search levels: Basic and Advanced. Basic search is selected by default.

Basic search enables you to retrieve service requests based on parameters related to a service request (number, citizen, or status), a task linked to a service request (type, status, assignee, or number), or a text string available in the request summary or the note associated with a service request. You may also use a combination of these parameters to restrict your search so as to retrieve only the service requests you want.

Advance search enables you to specify a number of logical arguments or conditions based on which the service request can be retrieved.

On executing a search, the service request(s) matching your search parameters are displayed in the results area of the Find Window. You can select any of the retrieved service requests and then click OK to view its details in the Service Requests window.

To find a service request using Basic search:

1. From the Navigator, select View Citizen Service Requests to open the Service Request Search window.

2. Select the parameters based on which you want to search for the service request.

3. If you are performing the search using a text string as the parameter:

   a. Select a search option to indicate how the text string you enter in the Keywords field is to be used for the search. You may select from the following options:

      Any Word: Finds service requests that contain any of the keywords in summary or notes.

      All Words: Finds service requests that contain all the keywords, in any order, in summary or notes.

      Phrase: Finds service requests that contain an exact match as the keywords in summary or notes.

Note: Attributes and values for each service request are recorded in the "Service Request Attribute" note. You can search for service requests based on the attributes recorded in the note.

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    b. Select where the search is to be performed. Select:

    Summary check box to search only in the request summary.

    Notes check box to search only in the notes associated with service requests.

    Both Summary and Notes check boxes to search in both the service request summaries and notes.

    c. Enter the text string to be used for the search in Keywords field.

4. Click Search to find matching service request(s) based on the parameters you have specified.

To find a service request using Advanced search:

1. Click on the Advanced tab.
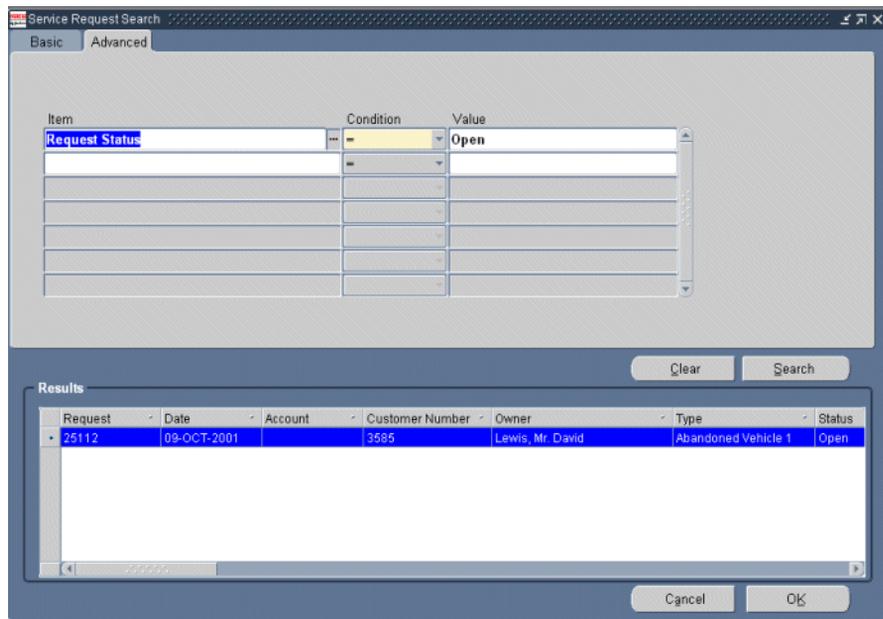
2. Define the logical condition(s) to be satisfied for identifying and retrieving service request(s). You may build your arguments around citizen number, contact name, severity level, etc.

To define an argument:

a. Select the item for which the argument is to be defined.

b. Select a logical operator to indicate how the item and value combination is to be used to identify service requests.

c. Select the value based on which the service requests are to be retrieved.

> **Note:** Each item, condition, and value combination is considered an argument. The AND operator is used on the background to create a complex argument if you define more than one condition. All the conditions set forth by a complex argument must be satisfied for identifying and retrieving service requests.

3. Click Search to find matching service request(s) based on the arguments you specified.

3.13 Creating and Maintaining Notes

Notes are used to record and manage the comments generated by the CSR against various services. Notes in a service request help in recording the descriptive information about citizen issues, any progress done by an agent in resolving this service request etc. You can enter notes either from the Notes tab in the Contact Center or in the Service Requests window.

3.13.1 Creating Notes in Contact Center

The Notes tab of the Contact Center window helps you create notes on the current citizen interaction. You can also access existing notes from this tab. Notes from previous interactions with the citizen are displayed in the spread-table in the Notes tab.

To create notes in Contact Center:

1. From the Contact Center window, open the Notes tab.

2. Click New to create a new note for the current citizen interaction.

3. Select the type of note you want to create in the Type field.

4. Select the status for the note in the Status field. The choices are Private, Public and Publish. If you use the Private status, this note would not be viewable to any citizen in a citizen facing application. Public notes are viewable by all employees and citizens. You can create additional Status codes. Please refer to the CRM Foundation Implementation Guide for more information.

5. Type in a summary of your citizen interaction in the Summary text box.

6. If you want to enter more details about the interaction, click Detail to open the Note Detail window. You can type in additional description in this window. Click OK to return to the Notes tab.

7. Save the note you have created.

To view notes in Contact Center:

1. To view details of a note, select the note from the spread-table. The contents of the note appear on the right.

2. Click Details to view additional lengthy descriptions, if any, associated with the note.

3.13.2 Creating Notes in Service Requests Window

To create notes in Service Requests window:

1. Navigate to the Service Requests window > workbench tab or access notes about a service request by clicking tools > Notes

2. Select a Note Type.

3. Select a Note Status.

4. Enter a brief description of the note in the Note field.

5. In case you want to enter more notes, click on details button to open the Note details window. Now you can enter additional text for this note. The Detailed Notes window holds textual notes up to 32 K in size.

6. Save the note.

The note appears in the spread table under the Notes and Knowledge base elements area.

In case you want to specify more details to the note like related to and related values fields while creating a note, access the main notes window by clicking on All notes button or clicking notes on the tools menu. This brings up the main notes window.

The main notes windows shows notes on two tabs: Notes and Summary. The Notes tab shows the notes in a summarized list form in a spread table. The summary tab displays the notes as text in a chronological or reverse chronological manner. You can change the chronological view by clicking on the latest first check box.

A Notes Find functionality is available. Open the Notes main window. Click on the flashlight icon on the tool bar to open the Notes Find window. Enter the fields like source, owner etc., and click Find button to display the results.

3.14 Searching the Knowledge Base

The Knowledge Base is a repository of solution sets that have already been contributed. The Knowledge Base system must be properly set up for this feature to work. After logging a service request, you can search a knowledge base.

You can search the Knowledge Base using:

- Keywords.

- Similar statements.

- Causes, Actions or other defined knowledge statement types.

- Solution sets.

A service request needs to be created first before the knowledge base can be searched from a service request. The knowledge base can also be searched independently of a service request, in which case the search results cannot be saved with a service request.

To search the Knowledge Base:

1. Navigate to the Contact Center window.

2. Click on the Search Knowledge Base button at the bottom of the Service Requests tab next to the Details button.

> **Note:**   You can also access the Knowledge Base from the Workbench tab in the Service Requests window. See Creating Complex Service Requests for details.
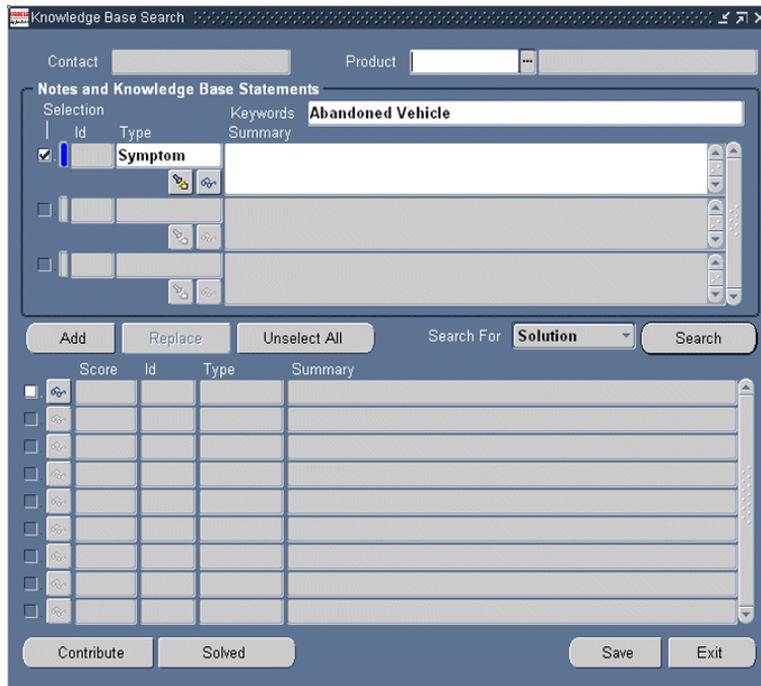
Certain types of notes saved on the service request are defaulted on the search screen. Note types are setup from the Knowledge Management module. The contact name fields are defaulted from the service request. The Service Request summary is defaulted into the Keywords for searching.

3. Select the notes to be used as the search parameter by selecting the Selection check box.

4. Select the appropriate option from the Search For drop-down list and click the Search button. The details of a note can be viewed by clicking the Details button next to the note.

5. On clicking the Search button, the search results appear in the table at the bottom of the search window. The details for a solution can be seen by clicking the Details button next to it. The Solution Detail window opens. This window displays solution details.

6. If you find a result useful to the citizen and want to save it, select the check box next to the result and click the add button. This will add the result to the list in the top section.

> **Note:** You can run a keyword search by entering a keyword into the Keyword field and clicking the Search button. The Service Request summary is defaulted into this field. This can be modified prior to the search.

7. You can search for a solution set for a statement type by selecting from the Search For drop-down list and clicking the Search button.

8. Once a result is added to the top section of the search window, the save button becomes enabled.

9. Click the Save button to save the added results along with the service request. You can view these results in the spread table under the Notes and Knowledge Base Statements area in the Workbench tab.

10. If you find that a particular solution has solved the citizen problem, you may increase the score of the solution. To increase the score of a solution, open the Knowledge Base window and select a saved solution and then click on the Solved button.

11. To close the Knowledge Base search screen, click on the Exit button.

3.15 Managing Critical Citizens

Oracle CIC allows agencies to define rules governing the criticality of their citizen base. Oracle CIC includes a predefined profile check which flags a citizen as critical. This profile check can be modified to meet your specific needs. The agent can then initiate proper action to resolve the situation or escalate the resolution process.

The Critical Citizen Management feature of Oracle CIC has the following functions:

■ Citizens can automatically become critical based on the criteria defined in the Critical Citizen profile check.

■ You can manually override the criticality of a citizen to change a non-critical citizen to a critical citizen.

■ You can manually override the criticality of a citizen to change a critical citizen to a non-critical citizen.

■ You can view the audit history of manual override activity for citizen criticality.

3.15.1 Finding Critical Citizens

To find a critical citizen:

1. From the Citizen Interaction Center responsibility, open the Find Criticality Overridden Customers window using the following navigation path:

   Citizen Management > Critical Citizen Management.

2. Enter either the citizen name or number.

3. Click Find.
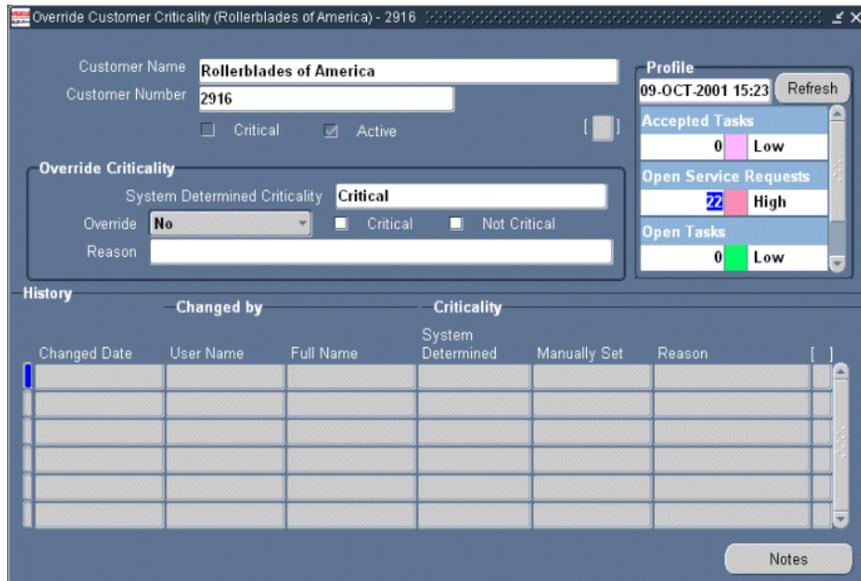
4. If the citizen is flagged as being critical, details are displayed in the Override Customer Criticality window. If the citizen is not flagged as being critical, the query returns no rows.

3.15.2 Overriding the Criticality of a Citizen

You may have situations when the profile engine does not determine a citizen as being critical based on the rules setup, but the citizen still needs to be flagged as critical. You can override the system-determined criticality in order to deal with temporary or exceptional situations.

To override the criticality of a citizen:

1. From the Citizen Interaction Center responsibility, open the Find Criticality Overridden Customers window using the following navigation path:

    Citizen Management > Critical Citizen Management.

2. Click New to open the Override Customer Criticality window.

3. In the Override Criticality section, select Yes in the Override field to update a non-critical citizen to a critical citizen. Select No in the Override field to update a critical citizen to a non-critical status.

4. Select an appropriate reason from the list of values in the Reason field.

5. Enter additional notes about this override in the Notes window. To open the Notes window, click Notes.

6. Enter the text of the note to further describe the citizen situation.

7. Optionally select a note type from the Type list of values.

8. Select a status of Internal, Personal or Publish.

9. Close the Notes window.

10. Save the changes you made. The changes you have made are recorded in the History section of the window.

3.15.3 Viewing Citizen Criticality History

Use the Override Customer Criticality window to view historical audit information about whether the system determined criticality was overridden. You can view the reason for the override, the user name of the person who changed the criticality, the date when it was changed and the original system determined criticality. The history region displays only manual overrides of criticality.

3.16 Using Relationship Plans

The Relationship Plans module is used for taking proactive and reactive care of your citizens. This module enhances real-time responses to citizen concerns.

The Relationship Plans module leverages the Events module to define complex conditions for relationship plans. It associates the outcome to real-time processes such as displaying alerts for the user, launching scripts, and running background processes for launching workflow.

Relationship plans can be defined at the citizen or account level to target the citizens with greater efficiency.

Relationship plans are automatically assigned to different citizens based on the plan criteria, which leverages the Citizen profile module. Citizens who fulfill the plan criteria are automatically assigned the appropriate plan.

The Relationship Plan Assignment Engine handles all automatic plan assignment to the citizen's plan portfolio. This engine checks all the plans that are part of the citizen's plan portfolio. The engine adds new plans if they are valid for the citizen. If a plan is invalid, the engine removes it from the citizen portfolio. If a relationship plan is manually assigned to a citizen, the Relationship Plan Assignment Engine ignores this assignment. For information about how to run the Relationship Plan Assignment Engine, refer to the Oracle Customer Care Implementation Guide.

3.16.1 Finding Relationship Plans for a Citizen

You can perform a search to identify the relationship plans assigned to a citizen's plan portfolio.

To find relationship plans:

1. From the Citizen Interaction Center responsibility, open the Relationship Plans Search window using the following navigation path:

   Citizen Management > Relationship Plans Management.

2. Enter search criteria. Citizen Name, Citizen Number, Account Number, Account Name, Plan Name, etc. may be used as the search criteria.

3. Click Search.

4. Search results are displayed in the spread-table at the bottom of the Relationship Plans Search window.

5. Select a plan from the spread-table and click OK to view the details of the plan in the Plans Summary window.

3.16.2 Working with Relationship Plans

By default, the Plans Summary window displays the citizen's plan portfolio. Citizen and account level plans are depicted in the hierarchy tree in the left panel. You can expand the hierarchy to view a summary of all the plans for the citizen. Select a plan from the hierarchy to view its details in the spread-table. To view details of all the plans for the citizen, select the citizen name from the hierarchy tree. Click on the Inquiry tab to view all the citizens to whom the current plan has been assigned.

From the Plans Summary window, you can:

- Add or remove plans.

- Create a relationship plan.

- View the audit history for a plan.

- View and modify details of a plan.

From the Plans Inquiry window, you can:

- Find all citizens to whom a current plan has been assigned.

- Disable a relationship plan.

- Customize a relationship plan.

3.16.3 Adding and Removing Relationship Plans

To add/remove relationship plans:

1. Open the Plans Summary window for the citizen. See Finding Relationship Plans for a Citizen for details.

2. Click Add/Remove. The Add/Remove Plans window opens.
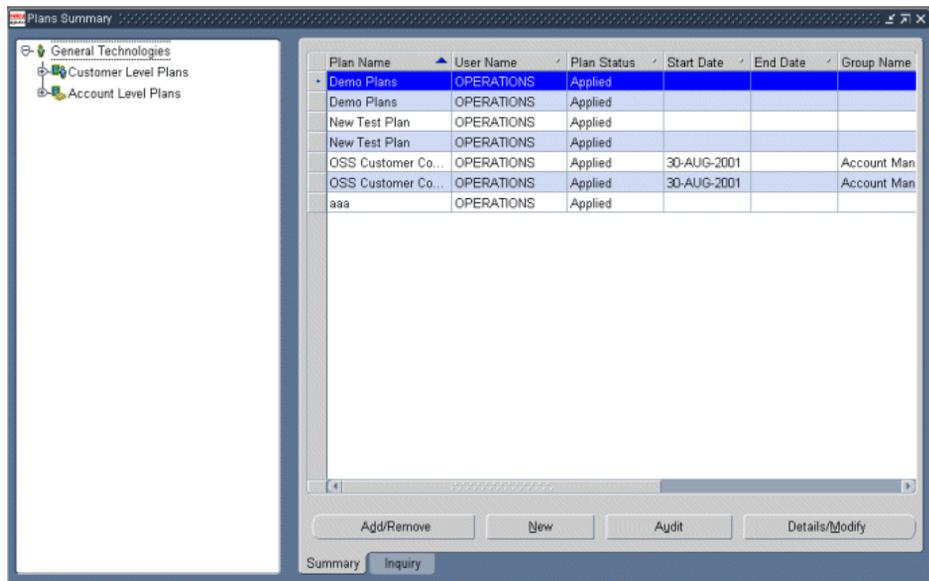
3. Click on the appropriate node on the hierarchy tree to view a list of available plans. For example, to list all citizen level plans, select the Citizen Level Plans node.

    Plans currently assigned to the citizen are listed below the selected node. Plans available to be assigned to the citizen are listed in the spread-table.

4. To assign a plan to the citizen:

   a. From the spread-table, select the plan you want to assign to the citizen.

   b. Click the Left Arrow button.

      The plan gets listed under the current node.

5. To remove a plan currently assigned to the citizen:

   a. From the hierarchy tree, select the plan you want to remove.

   b. Click the Right Arrow button.

      The plan is deleted from under the current node.

6. Click OK to save your work and return to the Plans Summary window.

   > **Note:** If you manually add a relationship plan to a citizen, you are overriding the relationship plan rules and the Relationship Plan Assignment Engine will ignore the rules for this manual assignment. If you manually remove a relationship plan from a citizen, the Relationship Plan Assignment Engine will again use the rules to determine relationship plan assignment.

3.16.4 Creating a Relationship Plan

To create a relationship plan:

1. Open the Plans Summary window for the citizen. See Finding Relationship Plans for a Citizen for details.

2. Click New. The New Plan window opens.

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

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

5. Optionally enter start and end dates for this relationship plan.

6. 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.

7. All relationship plans are initially created as a template, hence the Template check box is selected by default in the Plan Type section.

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

9. In the Plan Criteria region, you define the criteria to be used by the Relationship Plan Assignment Engine to determine associations between citizens and relationship plans. Select a profile check from the Profile Check list of values. The values in the list are dependent on the profile checks you previously defined.

10. Select an operator from the Operator list of values. The choices are =, <, >, >=. <=, Between, and Not Between.

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

12. Enter a high value if you previously selected an operator value of Between or Not Between.

13. Save your relationship plan.

14. Open the Plan Details tab.

15. Click New Condition. The Condition window opens.

16. Create the appropriate condition for the relationship plan you are defining.

17. Save the conditions and close the Condition window.

18. Save the relationship plan you have created.

3.16.5 Viewing Relationship Plan Audit History

The Audit History window presents audit information for all relationship plans that have been manually added or removed. It indicates when a plan was added or removed for the citizen.

To view audit history:

1. Open the Plans Summary window. See Finding Relationship Plans for a Citizen for details.

2. Click Audit.

3.16.6 Viewing and Modifying a Relationship Plan

Plans are not citizen specific. Any changes you make to a plan will be reflected for all the citizens to whom the plan is assigned.

To view and modify a relationship plan:

1. Open the Plans Summary window. See Finding Relationship Plans for a Citizen for details.

2. Select the plan whose details you want to view or modify.

3. Click Details/Modify.

4. The Modify Plan window opens. This window displays current plan details.

5. If necessary, modify the information, such as the Profile Check, in the Plan Headers tab. Note that you cannot change the name of the plan.

6. If needed, open the Plan Details tab.

7. If needed, add a new condition or modify existing condition(s).

8. Save the changes you have made.

> **Note:** If you want to stop using a relationship plan, you must inactivate it by entering a date in the End Date field. You are not allowed to delete relationship plans.

3.16.7 Finding All Citizens Assigned to a Relationship Plan

Use the Relationship Plans Inquiry tab to find all citizens who are assigned to a relationship plan.

To find all citizens assigned to a relationship plan:

1. Open the Plans Summary window. See Finding Relationship Plans for Citizens for details.

2. Click on a specific relationship plan.

3. Open the Inquiry tab. All citizens assigned to this relationship plan are displayed.

4. In the Inquiry window, you can click Disable to unassign a relationship plan from a citizen. See Disabling a Relationship Plan.

5. In the Inquiry window, you can click Customize to modify a relationship plan for a specific citizen. See Customizing a Relationship Plan for a Specific Citizen.

3.16.8 Disabling a Relationship Plan

Disabling a relationship plan from the Plan Inquiry window has the same effect as removing a relationship plan from a citizen's plan portfolio.

To disable a relationship plan:

1. Open the Plans Summary window. See Finding Relationship Plans for a Citizen for details.

2. Click on a specific relationship plan.

3. Open the Inquiry tab. All citizens assigned to this relationship plan are displayed.

4. Click on the citizen name for whom you want to disable the relationship plan.

5. Click Disable to disable this relationship plan for the selected citizen. The Status of this relationship plan for this citizen changes from Assigned to Disabled. This action will appear in the Relationship Audit History.

6. If you click on this citizen name again, the Disable button changes to Enable.

3.16.9 Customizing a Relationship Plan for a Specific Citizen

Typically, when you modify a relationship plan, your changes affect all citizens that have been assigned to that relationship. If you need to modify a relationship plan for a specific citizen, follow this procedure.

To customize a relationship plan for a specific citizen:

1. Open the Plans Summary window. See Finding Relationship Plans for a Citizen for details.

2. Click on a specific relationship plan.

3. Open the Inquiry tab. All citizens assigned to this relationship plan are displayed.

4. Click on the citizen name for which you want to customize the relationship plan.

5. Click Customize.

6. The Customize Plan window opens.

7. You must enter a unique name in the Plan Name field.

8. In the Plan Type region, the Custom radio button is enabled.

9. Make your changes in the Plan Headers or Plan Details tab as needed. Any changes you make apply only to the relationship plan for this customer. Refer to Viewing/Modifying a Relationship Plan for an explanation of how to use the Plan Headers and Plan Details windows.

3.17 Wrapping up a Call

The following buttons are visible at all times from the Contact Center window regardless of the tab you are using. To wrap up a call, you can use the Call Wrap Up or End Interaction buttons, depending on the situation.

Call Information: Use this button to open the Call Information window where you can view call (IVR) parameters such as ANI, DNIS, Order, System, and Account Code which the citizen enters while calling the service agency.

Call Wrap Up: Use this button to open the Call Wrap Up window where you can enter additional information about the interaction with the citizen. A default value is provided for outcome, result, and reason, which you can override if required. The interaction is ended when you click OK. The Call Wrap and End Interaction buttons are then disabled. Pressing Call Wrap Up to end the present interaction signals that you are ready to accept new calls.

End Interaction: Use this button to terminate the citizen interaction if there is no wrap up to be done for the call. If you click End Interaction, the Call Wrap Up and End Interaction buttons are disabled. Pressing End Interaction to end the present interaction signals that you are ready to accept new calls.

Agent On Break: Use this button to signal that you are on a break and are not available to accept calls. The button label then changes to Agent Off Break. When you are ready to accept new calls, press Agent Off Break to signal that you are back from the break. If you plan to take a break, you must click Agent On Break before you click End Interaction, because clicking End Interaction allows new calls to reach you.

4

Managing Service Request Resolution

Oracle CIC improves operational efficiency of agencies by rapidly processing service requests using predefined activities. Key resolution management features include creating and routing tasks automatically, email notifications, escalating service requests that have not been resolved within a predefined time period, and field service monitoring. This chapter covers the following topics:

- Working with Tasks
- Managing Duplicate Service Requests
- Scheduling Resources for Field Services

4.1 Working with Tasks

A task, defined in the simplest terms, is a work item. Tasks typically describe the actions required of personnel to resolve a service request. You can create a task for yourself or assign tasks to other resources. For example, you can create a task to call back a citizen or a task to dispatch personnel to resolve the specific issue.

Oracle CIC will automatically create tasks for service requests based on the service request type and the attributes you have captured. For example, a service request type called Abandoned Vehicle may capture attributes such as Make, Model, and Color. Depending on the model of the vehicle, Oracle CIC may generate a task to despatch an appropriate resource (big tow truck vs. small tow truck). In Oracle CIC, all these tasks are managed by a workflow process.

In special circumstances you may need to manually create tasks for a service request. Such tasks will bypass the workflow process.

You can manage tasks from the Tasks tab of the Contact Center. In the Tasks tab, you can create, update, assign and view previous tasks for the citizen. Previous tasks for the citizen are listed in the spread-table at the top of the tab, while details of the selected task are displayed in the fields below it. You can create a task directly from the Task tab by entering all the relevant information or by using a template.

4.1.1 Creating a Task Manually

If a service request must be processed manually, you will need to manually create appropriate tasks.

To create a task manually:

1.   Open the Task tab in the Contact Center window.

2.   Values in fields such as Status, Type, Priority, Owner Type, Assignee Type, and Owner are displayed by default based on profile options. You can use the list of values associated with these fields to change the default values.

3.   Enter a name for the task in the Name field.

4.   In the Desc. field, enter a brief description about the task.

5. If needed, in the Parent field, select a task to which this task is to be linked. Normally, you would select a parent task if the task you are creating is a follow up on another task.

6. Optionally select the Restrict Closure flag. A task with restricted closure means that if this task is related to a service request, the service request cannot be closed until this task is closed.

7. You may use the default values in the Assignee and Owner fields or change them by selecting from the list of values. You can also change these fields by using the Assignment Manager. To access the Assignment Manager, click the Assignment Manager button next to the fields. The Assignment Manager looks up the Calendar, Territory Management and Resource Management modules to assign an appropriate resource for the job based on skill set, availability and assigned territory. For additional information about the Assignment Engine, refer to *Oracle CRM Foundation Concepts and Procedures*.

8. Select the Planned Start and End Dates.

9. Save the task. On saving the task, a system generated task number is displayed in the Num field.

10. To manually launch workflow, click Launch Workflow if there is a workflow process associated with this task type.

11. Click More to open the Task Details window to enter details such as resource assignments, dependencies, references, and contacts.

4.1.2 Creating a Task Using the Task Template

To create a task using the task template:

1. Open the Task tab in the Contact Center window.

2. Click Use Template in the Task tab.

3. The Create Tasks from Template Group window opens.

4. In the Template Group field, select the template group based on the task which is to be created. Values in the Source Document, Source Name, Owner Type and Owner fields are defaulted. You may change these values, if needed.

5. Click Create Tasks.
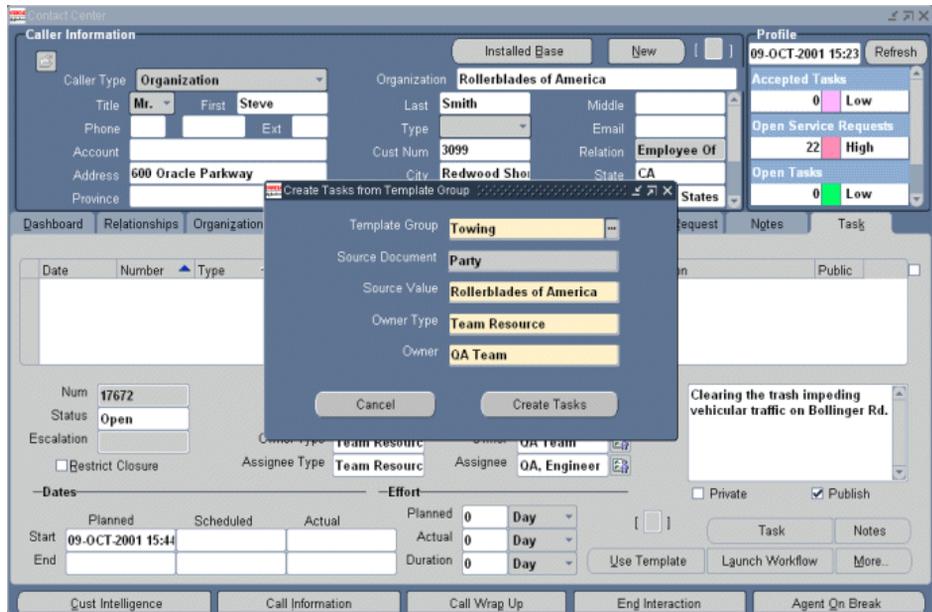
6. To manually launch workflow, click Launch Workflow if there is a workflow process associated with this task type.

7. Click More to open the Task Details window to enter details such as resource assignments, dependencies, references, and contacts.

4.1.3 Entering Task Details

The Task Details window helps you enter details such as resource assignments, dependencies, references, and contacts for the current task. To open the Task Details window, click More in the Task tab of the Contact Center window.

4.1.3.1 Defining Resource Requirements

Define resources as the tools and/or personnel needed to complete a task. The task owner assigns and schedules the required resources after choosing the best available options.

To define resource requirements:

1. Open the Task Detail window by clicking More in the Task tab. The Resource tab opens by default.

2. In the Resource Type field, select the resource type needed to solve the citizen issue.

3. In the Unit field, enter a numeric value. This value determines the numbered amount of a particular resource, for example, three hours.

4. Select the enabled check box if it is not already checked by default.

5. In the Assignments region, select from the list of values in the Type and Name fields.

6. Select the status of the task in the Status field.

7. If you want to schedule a resource, select the Schedule check box. To complete scheduling:

   a. Enter scheduled distance and duration values, and select a unit of measure.

   b. If you want to update actual schedule information, enter the actual Start and End dates.

   c. You may use the Assignment Manager to select and schedule the resource. To open the Assignment Manager, click the Assignment Manager button.

8. Click OK to save your work.

4.1.3.2 Setting Task Dependencies

Dependencies determine the order among tasks. When an action requires the creation of several tasks, setting a dependency for each task ensures the completion of a designated task before the start of another.

To set task dependencies:

1. From the Task Detail window, open the Dependencies tab.

2. Select the dependent task number from the list of values in the Task Number field. The task name is automatically displayed.

3. Enter a numerical value in the Offset field. This value determines the time that separates the action of initial tasks from subsequent tasks. Use this feature to organize tasks with time sensitive restrictions.

4. Select a unit of measure in the UOM field.

5. Click OK.

4.1.3.3 Linking Tasks to Source Documentation

Creating references to a source document allows you to reference pertinent background information. Source documentation could be the original request document that resulted in the creation of a task.

To link a task to its reference document:

1. From the Task Detail window, open the References tab.

2. Select from the list of values in the Document Type field.

3. Enter the identification number of the source document in the Number field.

4. Click OK.

4.1.3.4 Setting Recurrence Schedules

If the task is to be performed on a regular basis, you may specify a daily, weekly, monthly, or yearly schedule.

To set a recurrence schedule for a task:

1. From the Task Detail window, open the Recurrences tab.

2. Select the frequency for the recurrence of the task by selecting the Daily, Weekly, Monthly, or Yearly button. Your selection determines the fields available in the Recurrences tab.

3. In the Start field, select the date after which the task is to be repeated.

4. Optionally, in the End field, select the date after which the task will not be performed.

5. Set the recurrence schedule.

6. Click OK.

4.2 Managing Duplicate Service Requests

Oracle CIC identifies duplicate service requests when a potential duplicate service request is entered into the system.

The responsible party will receive a workflow notification with the service request reference that met the criteria to be deemed a potential duplicate. You will need to research this service request by comparing it against the deemed parent service request to determine if it is indeed a duplicate.

If the service request is a duplicate, the responsible party should respond to the workflow notification indicating that the service request is a duplicate. In this case, the duplicate service request will be updated with the number of the original service request in the Related To field. It is then closed.

If the service request is not a duplicate, you should respond to the workflow notification indicating that the service request is not a duplicate. In such cases, the service request will follow the normal resolution flow.

4.3 Scheduling Resources for Field Service

To create a schedule for field service representatives:

1. View the plan board.

2. Find Tasks.

3. Schedule a Task or Tasks:

    a. Manually.

    b. With help from the Assignment Manager.

    c. Automatically.

4. View the Schedule:

    a. On the plan board.

    b. On the gantt.

5. Recalculate a Service representative's Trip (Scheduler only).

6. Commit the Schedule.

4.3.1 Viewing the Plan Board

Use the plan board to view scheduled tasks for a service representative or a group of service representatives. You can also assign tasks, optimize the schedule, and access calendars and service request details.

To view the Plan Board:

1. Navigate to the Dispatch Center.

2. Select the Plan Board tab. The tasks and trips for the current day are shown.

3. Click More to enlarge the plan board.

4. Select Date to change the date to view.

5. Click Refresh to repopulate the plan board.

6. Click Territories to choose the group or groups of service representatives you want to view on the plan board.

7. Click Go to Resource to focus on a specific service representative. The service representatives name is highlighted and visible on the plan board.

8. Right clicking the service representatives name on the plan board brings up a popup menu.

9. Click Show Calendar to view the service representatives personal calendar.

10. Click Recalculate Trip to optimize a service representatives trip. The Scheduler needs to be installed to perform this task.

11. Right clicking a task brings up a popup menu.

12. Click Show Source Document to open the screen the task is created from.

13. Click Debrief to report on a performed task. The Field Service Report screen is opened.

14. Click Send Message to send a message to another user.

15. Click Assign Task to assign a task to the service representative.

16. Click Return to decrease the plan board.

4.3.2 Finding Tasks

Use this procedure to populate the Dispatch Center with tasks. Once you have populated the Dispatch Center with tasks, you can assign them or review them.

To find tasks:

1. Navigate to the Dispatch Center.

2. Put your cursor in one of the task detail fields in the upper half of the Dispatch Center.

3. Click Find. The Find Tasks screen appears.

4. Enter information to retrieve the kind of tasks you want to view. Check the Schedulable box to select only tasks ready for scheduling.

5. Click Find. The upper half of the Dispatch Center is populated with tasks. Tasks that are shown in bold are schedulable.

6. Select and right click on a service request number to show the service request with details for that particular task.

4.3.3 Scheduling a Task Manually

You can assign a task to a field service representative directly from the plan board. Use this procedure to schedule a single task for one or more service representatives.

To schedule a task manually:

1. Navigate to the Dispatch Center.

2. Populate the Dispatch Center with tasks.

3. Check the box next to the task you want to schedule.

4. When you are scheduling a single task for multiple resources, check the Add box.

5. You have several options to plan manually:

   On the Plan Board, select an empty cell in the service representative's trip and click the right mouse button. Click Assign Task from the popup menu.

6. Click Refresh to repopulate the plan board.

7. Repeat this procedure if you are scheduling a single task for multiple resources.

4.3.4 Scheduling a task with Help from the Assignment Manager

Use this procedure to access the Assignment Manager to assist in assigning a task to a qualified resource. For more information, see Overview of Assignment Manager.

To schedule a single task for one or more service representatives:

1. Navigate to the Dispatch Center.

2. Select a task for scheduling by checking it.

3. When you are scheduling a single task for multiple resources check the Add box.

4. Click the Advise button. The Assignment Manager screen is opened. See Using Assignment Manager for options or click Help.

5. Confirm the assignment by clicking Ok. The Plan Board and Gantt are refreshed.

6. Repeat this procedure if you are scheduling a single task for multiple resources.

4.3.5 Scheduling a Task Automatically

You can schedule a task automatically directly from the plan board. Use this procedure to automatically schedule tasks.

To schedule a task automatically:

1. Navigate to the Dispatch Center.

2. Select a task for scheduling by checking it. Check the Select All box to select all tasks at once.

3. Click the Auto-Assign button.

4. The Plan Board and Gantt are refreshed.

4.3.6 Viewing the Gantt

Use the Gantt to view progress on the dispatched schedules. A time line is shown to indicate the current date and time. Scheduled tasks show up in blue bars, escalated tasks show up in red bars, and travel time is shown as a transparent beginning of a scheduled task (Scheduler functionality). Shifts are indicated in yellow. Use the scroll bars in Resource and gantt chart to view more details or dates.

To view the Gantt:

1. Navigate to the Dispatch Center.

2. Select the Gantt tab.

3. Click More to enlarge the Gantt.

4. Select a date at From and To to define a date range you want to view.

5. Click Refresh to repopulate the Gantt.

6. Click Territories to choose the group or groups of service representatives you want to view on the Gantt.

7. Click Goto Resource to focus on a specific service representative's schedule. The service representatives name is highlighted and visible.

8. Right click the date or time on the gantt chart header to change the view of the gantt chart.

9. View task description by moving the mouse over a task. A task description is shown.

10. To view task details double click a task. The source document is opened showing the task details. For a service request task the Service Request screen is opened.

11. Click Scheduled times to view the schedules send out to the service representatives.

12. Click Predicted times to view progress on the schedules. Based on the actual times reported by the service representatives on tasks performed a prediction of the start times of following tasks is shown.

13. Click Return to decrease the Gantt.

4.3.7 Recalculating a Service Representative's Trip

Use this procedure to update and optimize a service representatives trip after assigning tasks. This will eliminate time conflicts within the trip and reset the scheduled start times of all tasks in the trip, accordingly.

To recalculate a service representative's trip:

1. Navigate to the Dispatch Center.

> **Note:** Double clicking a service representative when a task is checked in the upper half of the Dispatch Center, will assign the task to the service representative. The tasks remain checked in the upper half of the Dispatch Center.

2. Select the Plan Board.

3. Select the service representatives name and right click it. The popup menu appears.

4. Click Recalculate Trip.

5. Perform this procedure again to recalculate a trip for another service representative.

4.3.8 Canceling a Scheduled Task

Use this procedure to cancel a scheduled task. Once a task is canceled you can choose to schedule it again or close it.

To cancel a scheduled task:

1. Navigate to the Dispatch Center.

2. Click the Find button to search for the task. Select a task by checking it and change Status.

3. Select the Plan Board or Gantt to debrief on the task.

4. On the Plan Board or Gantt right click on the task you want to cancel. The popup menu appears.

5. Click Debrief. The Field Service Report screen is opened.

6. Click Update Task.

7. Change Task Status.

8. Click Save.

9. Return to the Dispatch Center.

10. Click Refresh. Task status is changed on the Plan Board and Gantt.

4.3.9 Re-assigning a Task

Use this procedure to move an already assigned task from one service representative to another.

To re-assign a task:

1. Navigate to the Dispatch Center.

2. Select the Gantt tab.

3. Select a task in the service representatives trip, drag and drop it onto the service representative to whom you want to assign the task.

4. Click Undo to cancel the drag and drop action.

4.3.10 Creating Additional Tasks

Use this procedure to create additional tasks for an existing service request from the Dispatch Center.

To create additional tasks:

1. Navigate to the Dispatch Center.

2. Select the service request you want to create an additional task for from the upper half of the Dispatch Center and right click it. The Service Request screen is opened.

3. Select the Plan Board and right click on a task with corresponding service request number from a service representatives trip. Select Show Source Document. The source screen is opened.

4. Click Help for more information.

4.3.11 Reporting on Tasks

Use this procedure to report on performed tasks on labor, parts, expenses, and counter readings.

To report on tasks:

1. Navigate to the Dispatch Center.

2. Select the Plan Board.

3. Select the task you want to report on and right click it. The popup menu appears.

4. Click Debrief. The Field Service Report screen is opened.

5. Click Help or follow this link.

4.3.12 Completing a Task

Use this procedure to change the task status to complete from the Dispatch Center. This is normally done when reporting on time and expenses in the Field Service Report.

To complete a task:

1. Navigate to the Dispatch Center.

2. Click the Find button to search for the task. Select a task by checking it and change its status.

3. Select the Plan Board or Gantt to debrief on the task.

4. On the Plan Board or Gantt right click on the task you want to complete. The popup menu appears.

5. Click Debrief. The Field Service Report screen is opened.

6. Click Update Task.

7. Change Task Status.

8. Click Save.

9. Return to the Dispatch Center.

10. Click Refresh. Task status is changed on the Plan Board and Gantt.

4.3.13 Viewing Statistics

Use this procedure to view an analysis on the performance of your service organization.

To view statistics:

1. Navigate to the Dispatch Center.

2. Select the Statistics tab.

3. Click More to enlarge the window.

4. Click Territories to choose the group or groups of service representatives you want to view in your statistics.

5. Select a date in From and To to define a date range for your statistical data to be presented.

6. Choose an option from the drop-down list.

7. Click Refresh. The statistical data is presented for the date range defined.

4.3.14 Selecting Territories

The Dispatch Center shows information for the group or groups selected.

To select territories:

1. Make a selection from the territories assigned to you.

2. To view territories not assigned to you check the Show all territories box.

4.3.15 Committing the Schedule

Use this procedure to change task status for all tasks for a selected date. This is done to commit to the schedule so that the schedule gets communicated to the service representatives.

To commit the tasks schedule:

1. Navigate to Commit Schedule.

2. Make a selection from the list of values at From Status.

3. Make a selection from the list of values at To Status.

4. At Scheduled Date enter the date for which you want to commit the schedule.

5. Click OK to change the task status.