

Oracle® TeleService

Implementation Guide

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Oracle TeleService Implementation Guide, Release 11i

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Oracle TeleService Implementation Guide, Release 11*i*

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Preface

Welcome to the Oracle TeleService Implementation Guide, Release 11*i*.

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

- The principles and customary practices of your business area.
- Oracle TeleService.

If you have never used Oracle TeleService, Oracle suggests you attend one or more of the Oracle Applications 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

The Oracle TeleService Implementation Guide contains the information you need to understand and use Oracle TeleService. This guide contains four chapters:

- Chapter 1 describes the steps required to implement service request functionality.
- Chapter 2 provides instructions for setting up automatic service request and task assignment.
- Chapter 3 describes how to automate task generation for service requests.
- Chapter 4 provides the steps for implementing the Customer Care module which encompasses the Contact Center and Relationship Plans.
- Chapter 5 provides the steps for implementing the Charges module.
- Chapter 6 explains how you can automate the submission of Oracle Field Service charges.
- Appendix A includes information useful for integrating relationship plans in other Oracle E-Business Suite applications.
- Appendix B answers some frequently asked questions about relationship plans.
- Appendix C lists the seeded relationship plan data.
- Appendix D lists lookup codes used by the application.
- Appendix E lists seeded data you can use for setting up function and data security.
- Appendix F lists the system profiles for the Service Request and Customer Care modules of Oracle TeleService.

Documentation Accessibility

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Other Information Sources

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

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).

- **PDF Documentation** - See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on Oracle*MetaLink* and is updated frequently.
- **Online Help** - Oracle TeleService provides the *Oracle TeleService User Guide* and sections of this guide as online help. Only those sections relating to specific setup windows and HTML pages are included. Online help patches are available on MetaLink.
- **11i Release Content Document** - Refer to the Release Content Document for new features listed release. The Release Content Document is available on Oracle*MetaLink*.
- **About document** - Refer to the About document for information about new and changed features in this release. This document also provides information about new documentation or documentation patches that you can download. The new About document is available on Oracle*MetaLink*.

Related Guides

Oracle TeleService shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle TeleService.

You can read the guides 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>.

Guides 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). 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.

Guides Related to This Product

About Oracle TeleService

This online document describes new features and changes to Oracle TeleService since the last major release. It is available on [OracleMetaLink](#).

Oracle Common Application Components User's Guide

This guide explains how to use Assignment Manager and Resource Manager and other common application components.

Oracle Common Application Components Implementation Guide

This guide explains how to implement Assignment Manager and Resource Manager and other common application components including notes and tasks.

Oracle Universal Work Queue Implementation Guide

This guide explains how to implement the work queue agents use to get their work and telephony integration for Oracle TeleService.

Oracle Knowledge Management Implementation Guide

This guide explains how to implement the knowledge base both agents can use to resolve customer problems.

Oracle Territory Manager User Guide

This guide explains how to set up territories using the Oracle Territory Manager module.

Oracle Territory Manager Implementation Guide

This guide explains how to implement the Oracle Territory Manager module.

Oracle Contracts Core Implementation Guide

This guide explains in more detail how to set up events which are used by Oracle TeleService relationship plans.

Oracle Install Base Implementation Guide

This guide describes how to setup the installed base for tracking customer products.

Oracle iSupport Implementation Guide

This guide describes how to implement the Web-portal customers can use to create service requests and monitor their status.

Oracle Field Service Implementation Guide

This describes steps to implement Oracle Field Service.

Oracle Scheduler Implementation Guide

This guide helps you implement the Oracle Advanced Scheduler agents can use to schedule field-service tasks.

Oracle Scripting Implementation Guide 11i

This guide describes how to implement Oracle Scripting components and test the implementation appropriately.

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 and the Oracle 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 guides and implementation guides.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

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.

About Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the About Document for your product. About documents are available on Oracle *MetaLink* for most products starting with Release 11.5.8.

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 and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms 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

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle TeleService implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide 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 *OracleMetalink*

Oracle Applications Message Manual

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

Training and Support

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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.

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Implementing Service Requests

This chapter describes steps required to successfully implement service-request-related functionality in Oracle TeleService.

It covers:

- About Configuring Service Requests to Model Business Processes on page 1-2
- Configuring Service Requests to Model Business Processes on page 1-6
- Creating and Updating Status Groups on page 1-10
- Setting Up Service Request Types on page 1-15
- Restricting Access to Service Request Information on page 1-19
- Setting Up Service Request Severities on page 1-29
- Setting Up Service Request Urgencies on page 1-31
- Defining Service Request Problem Codes on page 1-32
- Setting Up Message Action Codes on page 1-66
- Setting Up Task Types and Priorities for Service Request Usage on page 1-67
- Setting Up the Display of Oracle Install Base Items on page 1-67
- Setting Up HTML Applications for Service Requests on page 1-67
- Setting Up Service Request Profile Options on page 1-68
- Indexing Note and Summary Text for Searches on page 1-69
- Creating Owners and Supervisors on page 1-69
- Setting Up Service Request Linking Through Relationships on page 1-71
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- Setting Up the List of Values for the Language Field on page 1-95
- Setting Up Default Response and Resolution Times on page 1-96
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- Setting Up Custom Tabs on the Service Request Window on page 1-100
- Integrating with Oracle Enterprise Asset Management on page 1-105
- Enabling Oracle Complex Maintenance, Repair, and Overhaul on page 1-105

1.1 About Configuring Service Requests to Model Business Processes

This group of topics provides a conceptual overview of the service request setups you can perform to model the different ways your organization handles customer problems. It covers the following related features:

- Service Request Statuses
- Status Groups and Status Transitions
- Service Request Types

The last section, Summary of Setup Outcomes, explains how these features can work together.

Service Request Statuses

Service request statuses provide a classification system which makes it possible for your organization to track the stage of a response to a customer problem from the initial customer contact to resolution.

The statuses seeded in Oracle TeleService are:

- Waiting
- Clear
- Closed
- Open
- Cancelled by User

You can set up different statuses for different types of customer problems. For example, you may wish to include the status of “Invoice Corrected” for service requests about billing problems, but for equipment exchanges you may wish to

include “Received”, “Fixed”, and “Shipped Back to Customer”. In Oracle TeleService you specify all of the possible statuses first and then specify their uses later by grouping them in Status Groups.

You can specify what kinds of changes users can make to a service request with a specific status. For example, if your organization calculates the amount a customer is to be billed only after work has been completed, then you will want to permit agents working on service requests with the status of “Open” to update the information about the customer problem but not to update charges the customer has incurred. When the work has been completed and the service request has the status of “Closed”, then you may want to bar agents from updating the problem information but permit them to modify the charges.

Service Request Status Groups and Status Transitions

For each Service Request Type, you can specify which of the service request statuses you have created make sense for that particular type of customer problem. The list of permissible statuses is called a Status Group.

For example, “Invoice Corrected” makes sense as a status of a service request for a billing question and “Repaired” as a status for inhouse equipment repairs, but not vice versa.

Status groups make it possible for you to group your statuses according to use and to determine the initial status for a service request and the permissible status transition rules for each status in the group. The initial status is the default status of the service request when agents or customers create it. The transition rules make it possible for you to determine what statuses agents or customers can choose for a service request of a given status.

For example, you may want all new service requests to get the status of New, but you will not want to permit agents to set it back to New after it has already been worked on. Or you may not want to permit agents to turn a “Closed” service request back to “Open” or “New” because work has already been completed.

Note: The status transition rules only govern what statuses users can select, they do not determine whether the information in the service request can be updated or not. You determine whether users can modify information when you set up the statuses themselves.

Service Request Types

Agents use Service Request Types to categorize service requests based on the type of question or problem. If you have implemented Oracle iSupport, then customers can also use Service Request Types to categorize their problems when they create a service request on the Web.

Examples of Service Request Types include:

- Request for Information
- Customer Complaint
- Billing Issue
- Installation Request
- Preventive Maintenance Visit
- Return
- Depot Repair

You can set up Service Request Types to:

- Channel different types of customer problems and inquiries to different groups in your organization

This is accomplished by associating Service Request Types with different Responsibilities. For example, you may wish to restrict only accountants to viewing and updating Billing Issue type service requests and you may wish to restrict access to Installation Requests to the field service organization.

- Provide data security

The Responsibility to Service Request Type mappings provide data security not just for the service request information itself, but also for all related information including service request tasks, notes, and interaction history.

Agents that are barred from using a Service Request Type cannot view or modify any service-request-related information.

- Restrict agents to using appropriate problem and resolution codes

Problem codes and resolution codes provide agents with a quick and consistent way of classifying customer problems and resolutions. You can specify which codes map service request types to problem codes and resolution codes to restrict selection to those appropriate to the problem.

- Automatically create tasks when a service request is created

You can use Service Request Types along with Problem Codes, Items, and Item Categories to generate tasks that need to be performed to resolve the customer problem. You can then have agents or dispatchers assign these tasks to the engineers who will do the work.

- Capture additional information about a customer problem

You can set up Service Request Types to capture additional information you may need to resolve the customer problem. This is beneficial mostly to organizations handling problems reported by individuals who are not the owners of the item to be serviced. These include government agencies that must fix broken streetlights, repair roads, or tow away abandoned vehicles. For example, a government agency receiving a call about an abandoned vehicle must capture the make, model, color, and the license plate number so the towing service knows which vehicle to tow away and what tow truck to send to do the job.

Based on the information entered, the application can automatically create different tasks and check if the new service request is a duplicate.

- Launch Oracle Workflow processes

Each Service Request Type can be linked to an Oracle Workflow process that can be automatically launched when agents create or update a service request of this type.

Summary of Setup Outcomes

This topic provides a summary of outcomes of different Service Request Types, Status Groups, and Status transition setups:

- If you map a Service Request Type to a Status Group with transition rules, then agents can only change the Status of service requests of this type to Statuses permitted by the transition rules.
- If you map a Service Request Type to a Status Group that does not have any transition rules, then agents can set service requests to any status listed in that Status Group.
- If you do not map a Service Request Type to a Status Group, then agents can set service requests of that type to any status.

1.2 Configuring Service Requests to Model Business Processes

Use this general procedure as a guideline for setting up service request Statuses, Status Groups, and Service Request Types to model your business processes.

To set up service requests to model your business processes:

1. Set up service request Statuses for all types of service requests. See Setting Up Service Request Statuses on page 1-6.
2. Group the Statuses into the groups that will be used by different Service Request Types and create permissible status transitions for each group. See Creating and Updating Status Groups on page 1-10.
3. Set up Service Request Types and specify what Status Groups they use. Indicate any workflows to be launched when different types of requests are created or updated. See Setting Up Service Request Types on page 1-15.
4. If you wish to limit access to Service Request Types by Responsibility, then follow the procedure for setting up service request data security described in Granting Access to Service Request Types by Responsibility on page 1-19.

1.3 Setting Up Service Request Statuses

Use this procedure to set up service request Statuses. The Status of a service request tracks the status of a customer problem from the initial customer contact to resolution and controls what kind of information in the service request can be updated.

You can also set up Statuses to:

- Indicate the service request has been responded to or resolved and automatically fill in the date and time in the Responded On or Resolved On fields.
- Indicate a service request is on hold. This makes the application ignore the service request when assessing the priority of work for agents.

To set up a service request Status:

1. Navigate to Setup > Service Requests > Service Request Status.
The Service Request Statuses window appears.

Status	Responded	Resolved	Final	Initial	On hold	Classification	Start Date	End Date	Pre-Defined	Text	Color	Sort Order
Assignment/Dispatch Complete	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Waiting on Cust			<input type="checkbox"/>			
Cancelled by User	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input checked="" type="checkbox"/>			
Clear	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input checked="" type="checkbox"/>			
Closed	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>			
Closed As Duplicate	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>			
Customer Reopened	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Waiting on Cust			<input type="checkbox"/>			
Customer Updated	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Waiting on Supp	04-SEP-2000		<input type="checkbox"/>			
Engineer On-Site	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>			

Description:

Service Request Status Restrictions

- Disallow Request Update
- Disallow Task Update
- Disallow Charge Update
- Disallow Owner Update
- Disallow Product update
- Disallow Charge

2. Enter a name in the Status field. The text you enter here is what is displayed in the Status List of Values (LOV) in the Service Request window.
3. By selecting the Responded check box, you can set a status to automatically fill in the date and time in the Responded On field of the service request. The date and time reflect the time the agent sets the service request to this Status.
4. By selecting the Resolved check box, you can set a status to automatically fill in the date and time in the Resolved On field of the service request. The date and time reflect the time the agent sets the service request to this status.
5. Select the Final check box if you want the application to:
 - Enter the date in the Closed field of a service request set to this status.
The Closed field appears in the Service Request window header.
 - Disable autoassignment of service request ownership for service requests set to this status.
Autoassignment ignores all service requests set to a status flagged as Final. (For information on automatic service request ownership assignment, see Chapter 2, "Implementing Service Request and Task Assignment".)
 - Terminate any instances of the workflow you have associated with the service request of that type in the Service Request Type window.

You can set up a service request to automatically launch a workflow whenever an agent creates or updates it. Because each update launches a new instance of the workflow, each service request can have multiple instances of the workflow running at the same time. (See Setting Up Service Request Types on page 1-15 for details about associating workflows to Service Request Types.)

If a workflow is running and an agent sets the service request to a status you flag as Final, then the application takes one of two possible actions:

- * Warns the agent with a message that an instance of the workflow is running and permits the agent to terminate the workflow by clicking a button in the message text.
- * Aborts any instances of the workflow automatically without warning the agent.

If you wish to abort the workflows automatically without the warning messages, then you must select the Abort Workflow on Final Status without Warning check box in the Service Request Type window. If you leave this check box unselected, then agents always receive a warning.

6. If you wish to use the status you are creating as the initial status of any type of service request, then select the Initial check box. You may wish different service requests types to have a different initial statuses. For example, you may wish to designate a service request created by a customer using Oracle iSupport as “Opened by customer” and one opened by service agent in the Service Request window as “New”.

Note: You must designate a status as initial here, if you want to use it as the initial status of service requests for a Status Group.

7. If you are using the Next Work functionality to deliver the next service requests to an agent, then you may wish to designate a status as on hold by selecting the On Hold check box. An on-hold status indicates that work on the service request is temporarily suspended because an agent is waiting for more information from the customer or for spare parts to become available, for example.

Automated assignment permits agents to request the next most urgent piece of work from the Universal Work Queue by clicking the Next Work button.

Placing a service request on hold excludes the service request from the pool of work evaluated by the application when the agent requests the next highest priority work item.

Without an on-hold status, the application will deliver the same service request over and over again if it happens to be the item with the highest priority.

See the Implementing Service Request and Task Assignment chapter of this guide for more information.

8. The Classification field is reserved for future functionality. It will be used for grouping service request statuses in management reports.
9. Optionally, enter Start and End dates for the status if you wish to restrict status use. By specifying a future start date you can delay the use of a new status. You can inactivate a status by setting an end date.
10. A check mark in the Predefined check box indicates the status was seeded by Oracle. You cannot delete a predefined status, but you can modify its wording or remove it from use by entering an end date.

Oracle includes the following predefined statuses:

- Waiting
 - Clear
 - Closed
 - Open
11. If you wish to assign a color to the text the support agent sees in the Status field of the Service Request window, then select the color using the Text Color field.
 12. If you wish to restrict users from updating certain types of information, then select one or more of the Service Request Status Restriction check boxes:
 - Disallow Request Update: Prevents users from updating the service request.
 - Disallow Task Update: Prevents users from updating tasks related to the service request in the Service Request window. (Tasks can still be modified from within the Oracle Task user interface, however.)
 - Disallow Charge Update: Prevents users from updating charges.
 - Disallow Owner Update: Prevents users from updating service request ownership.
 - Disallow Product Update: Prevents users from updating product information.

- Disallow Charge: Prevents users from entering charges information.

13. Save your changes.

14. Repeat the above procedure for all the statuses you need for all of your Service Request Types.

You are now ready to group the statuses you have created into Status Groups specific to each Service Request Type according to the procedure outlined in Creating and Updating Status Groups on page 1-10.

1.4 Creating and Updating Status Groups

Use Status Groups to create lists of statuses to be used with different Service Request Types. Status Groups also make it possible for you to determine the initial status for a service request and the permissible status transition rules for each status in the group. This topic covers:

- Viewing and Updating Status Groups
- Creating New Status Groups
- Adding a Status to a Status Group
- Creating Transition Rules for Statuses in a Status Group

For more information about Status Groups and how they relate to service request statuses and types see About Configuring Service Requests to Model Business Processes on page 1-2.

1.4.1 Viewing and Updating Status Groups

Use this procedure to view existing Status Groups on the Status Group Summary window. This window provides the launching point for updating, copying, and creating new Status Groups.

To view and update Status Groups:

1. Navigate to Setup > Service Requests > Status Groups and Transitions.

The application displays the Status Group Summary page in a new browser window. The page lists the existing Status Groups.

ORACLE Diagnostics Preferences Help Close Window

Status Group Summary

TIP You can go to TeleService Forms Setup to associate a status group to either a service request type or a service request type and responsibility.

[Create New Group](#)

Name	Description	Start Date	End Date	Update	Duplicate
345	345				
Agent Group	Agent set of statues and transitions Test update.				
Billing Inquiries					
Charges					
Copy of SRQA Status Group	Copy test	24-Jan-2003	24-Jan-2010		
Copy of Test Status Group	Test Status Group	24-Jan-2003			
Copy of Test Status Group	Test Status Group	28-Jan-2003			
Customer Call	test, update	01-Jan-2003			
Demo Status Group	Demo Status Group	01-Jan-2003			
Depot Repair	Depot Repair				

Previous Next 10

2. If you wish to sort the existing Status Groups by name, description, start, and end dates, then click on the appropriate column heading.
3. If you wish to edit an existing Status Group, then click **Update** (the pencil icon).
4. If you wish to make a copy of an existing Status Group so you can use it as a template for other Status Groups, then click **Duplicate** (the icon with the two sheets of paper.)
5. If you wish to create a new Status Group, then click **Create New Group** and follow the procedure outlined in Creating New Status Groups on page 1-11.

1.4.2 Creating a New Status Group

Use this procedure to create a new Status Group.

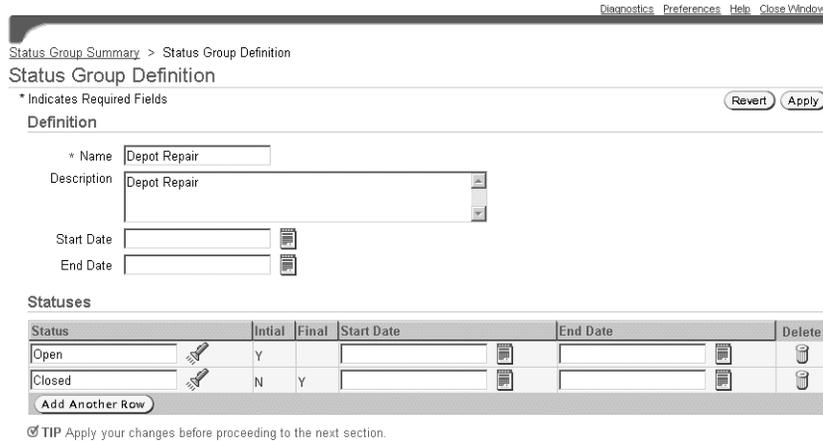
Prerequisites

You must create statuses first following the procedure outlined in Setting Up Service Request Statuses on page 1-6.

To create a new Status Group:

1. Navigate to Setup > Service Requests > Status Groups and Transitions.
2. Click **Create New Group** in the Status Group Summary page.

The Status Group Definition page appears.



Definition

* Indicates Required Fields Revert Apply

Name: Depot Repair

Description: Depot Repair

Start Date:

End Date:

Statuses

Status	Initial	Final	Start Date	End Date	Delete
Open	Y		<input type="text"/>	<input type="text"/>	
Closed	N	Y	<input type="text"/>	<input type="text"/>	

TIP Apply your changes before proceeding to the next section.

3. Enter a name for the group in the Name field.
4. Enter an optional description.
5. Enter start and end dates if you wish to restrict the availability of this Status Group.
6. Using the Add Another Row button, add the statuses for this group. (See Adding a Status to a Status Group on page 1-13 for details.)

The Initial and Final flags and the rest of the status information is read only. It can only be updated while editing the statuses themselves.

7. After you have completed adding all of the statuses for your group click **Apply** to save.
8. Scroll down to the Default Initial Status region and select the default status for new service requests for this Status Group. You are limited to selecting statuses with the Initial flag set to Y.
9. Click **Apply**.

1.4.3 Adding a Status to a Status Group

Use this procedure to add a status to a Status Group you are creating or editing in the Status Group page.

Prerequisites

You must be in the process of creating or editing a Status Group in the Status Group page.

To add a status to a Status Group you are editing or creating:

1. Click **Add Another Status**.
2. Click **Search for Status** (flashlight icon) to the right of the Status field.

The Search and Select Status page appears.

Search and Select: Status

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By: Name | %ar%Closed% | Go

Results

Select	Name	Description	Initial	Responded	Resolved	Final	Quick Select
<input type="radio"/>	Hard Closed	Service can never be reopened nor updated	Y	Y	Y	Y	<input type="radio"/>
<input type="radio"/>	Charges Closed		Y	Y	Y	Y	<input type="radio"/>

Cancel Select

3. Click **Go** to display all statuses or enter a partial name first for a short list matching your search criteria.
4. Select the radio button corresponding to the status you wish to add.

Note: You can only add one status at a time.

5. Click **Select**.

The status you selected appears in the Status Group page.

1.4.4 Creating Transition Rules for Statuses in a Status Group

Use this procedure to create status transitions for a Status Group you are editing or creating.

Note: If you wish to use the automatic status update feature offered by service request relationships, then the Status Group must include the seeded statuses of “Waiting”, “Cleared”, and “Closed”.

If you are setting up transition rules, then the Status Group must also permit all transitions to the status of “Closed”. This is because an agent can indicate one service request is a duplicate of a second service request, an action that automatically sets the first service request to the status of “Closed.” A transition rule you enter here takes precedence and can prevent this automatic resetting of statuses. See *Setting Up Service Request Linking Through Relationships* on page 1-71 for more information.

Prerequisites

- You must be in the process of creating or editing a Status Group in the Status Group page.
- You must add a status to the group before you can create a transition rule for it.

To add a transition rule for a Status Group you are editing:

1. Scroll down to the Transitions region of the Status Group page.
2. Click **Add Another Row**.
3. A new row opens.
4. To enter the status to transition from, click the flashlight icon to the right of the Status From field.
5. The Search and Select From page appears.
6. Click **Go** to display all statuses or enter a partial name first for a short list matching your search criteria.
7. Select the radio button corresponding to the status you wish to add.

Note: You can only add one status at a time.

8. Click **Select.**

The status you selected appears in the Status From field in the Status Group page.

9. Enter the status you wish to transition to in the Status To field. You can do this by clicking on the flashlight icon to the right of the Status To field. The procedure is the same as for the Status From field.**10. Click **Apply**.****11. If you wish to delete a rule, then click **Delete** (the trash can icon) and click **Apply**.**

1.5 Setting Up Service Request Types

Use this procedure to set up Service Request Types which your agents will use to categorize customer problems. You can set up Service Request Types to:

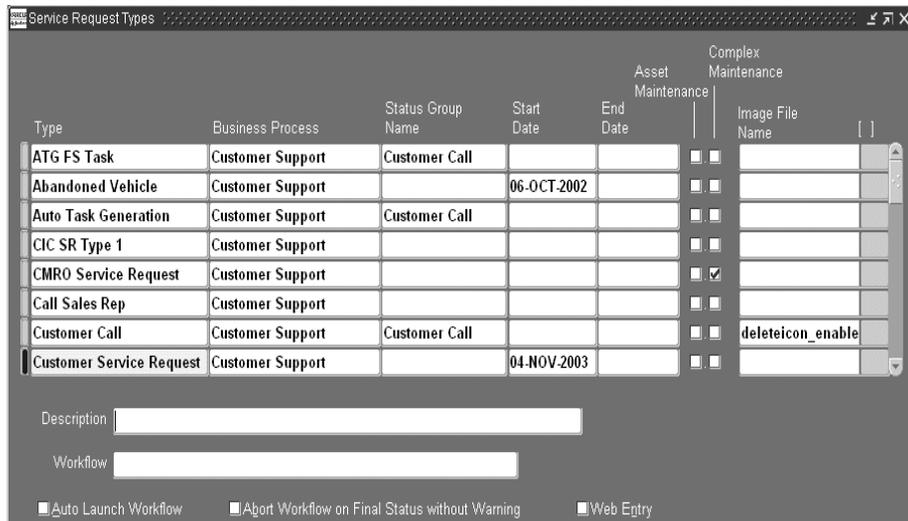
- Channel service requests to different groups in your organization by associating Service Request Types with responsibilities.
- Trigger a workflow whenever a service request of that type is created.
- Limit agents to using a subset of service request statuses by linking a Service Request Type to a Status Group.
- Enable contractual discounts by mapping a Service Request Type to a business process.
- Specify Service Request Types to be used for customers to log service requests on the Web using Oracle iSupport.

Prerequisites:

You must create the object you wish to link to the Service Request Type first. For example, if you wish to link a Service Request Type to a Status Group, then you must create the Status Group first.

To set up Service Request Types:**1. Navigate to Setup > Service Requests > Request Types.**

The application displays the Service Request Types window.



2. For each Service Request Type you wish to create:
 - a. Enter a name of the Service Request Type in the Type field. This is the text agents see in the Type list of values in the Service Request window.
 - b. If you have implemented Oracle Contracts, then select a business process from the Business Process list of values. Selecting the business processes links Charges to Oracle Contracts to determine the type of coverage and discounts for any billable work performed on behalf of the customer.
 - c. Optionally, enter Start and End dates to control the use of Service Request Types. By specifying a future start date you can delay the use of a new Service Request Type. You can inactivate a type by setting an end date.
 - d. Enter a description for the Service Request Type.
 - e. If you have set up a Status Group suitable for this Service Request Type, then select it using the Status Group Name LOV. You can reuse the same Status Group for multiple Service Request Types. If you leave this field blank, then users will be able to use all statuses you have defined.

Note: If you are restricting the use of Service Request Types by Responsibility, then you can specify different Status Groups for every Responsibility that can use a particular type. This mapping, done in a separate setup, supersedes any mapping you make here. See Restricting Access to Service Request Information on page 1-19.

- f. If you wish to enable this Service Request Type for use with Oracle Enterprise Asset Management then select the Asset Maintenance check box.
- g. If you wish to enable it for Oracle Complex Maintenance, Repair, and Overhaul, then select the Complex Maintenance check box.
- h. If this Service Request Type is being used in Oracle iSupport, then you can display an image to help customers select the correct type during request creation. For example, a computer hardware company may present users with an icon of a printer for the Printer Trouble and an icon of a monitor for Monitor Trouble. To display the image, upload the image to APPL_TOP in the OA_MEDIA directory and enter the name in the Image File Name field.
- i. Optionally, you can associate a workflow with a Service Request Type by selecting a workflow using the Workflow LOV.

Oracle TeleService includes three seeded workflows which are a part of the SRVEREQ item type and appear in the LOV:

* **Call Support Process**

Use this workflow only under special circumstances described below.

* **Customer Support Event Process**

Do not use this workflow. It is used by Oracle TeleService internally.

* **Duplicate Check and Autotask Create for iSupport and Email Center Created SR**

Use this workflow to check for potential duplicate service requests for service requests created in Oracle iSupport and Oracle eMail Center.

These three workflows are described in detail below:

- * **Call Support Process:** This workflow notifies the individual service request owner each and every time a service request of this type is created or updated. The owner can set the status of the service request to closed by clicking the Resolved button on the notification.

In this release, this workflow has been superseded by a more flexible notifications process which implementers can use to selectively notify both service request owners and customer contacts of service related events. (See Setting Up Notifications on page 1-79). You will want to associate this workflow to a type only if the resolution functionality is important to you.

If you associate this workflow with a Service Request Type and also use the new notifications feature, owners may receive two notices for the same event.

- * **Customer Support Event Process:** This process notifies service request owners and contacts of different events related to service requests and is used by the notifications feature of Oracle TeleService. See Setting Up Notifications on page 1-79.
- * **Duplicate Check and Autotask Create for iSupport and Email Center Created SR:** Use this workflow to check for potential duplicate service requests for service requests created in Oracle iSupport and Oracle eMail Center.

This workflow process checks for potential duplicate service requests when customers create service requests using Oracle iSupport or agents create service requests from within Oracle Email Center. If the workflow finds a potential duplicate, it notifies the service request owner. When customers create a service request of a type set up with extended attributes, the program instead alerts the individual you specify in the Alert Recipient field of the Service Request Attributes Configuration window. You must be sure to select the autolaunch check box to enable this process.

- j. If you have associated a workflow, then select one or both of the related check boxes:
 - * **Auto Launch Workflow:** Launches workflow automatically when a service request is created and updated.
 - * **Abort Workflow on Final Status without Warning:** Selecting this check box aborts without warning any instances of the workflow you have associated with this Service Request Type whenever an agent sets that service request's status to a status that is flagged as Final in the Service Request Statuses window. (See Setting Up Service Request Statuses on page 1-6.)

If you do not select this check box, then the agent always receives a warning if a workflow is about to be terminated and has a chance to cancel the abort.

- k. If you wish to make this Service Request Type available to customers who are creating service requests on the Web using Oracle iSupport, then select the Web Entry check box.
3. When you have completed creating your Service Request Types, then click **Save** on the toolbar.
4. If you have selected the Auto Launch Workflow check box for any Service Request Type, then you must set the service system profile option Service: Auto Launch Workflow to Yes.

1.6 Restricting Access to Service Request Information

This group of topics explains how you can restrict user access to service request data.

- About Service Request Security on page 1-19 provides an overview.
- Setting Up Service Request Data Security on page 1-22 outlines the major steps.
- Creating Your Own Custom Security on page 1-27 provides guidelines for organizations wishing to set up their own custom security.

The rest of the topics provide detailed procedures:

- Mapping Responsibilities to Service Request Types on page 1-22
- Turning Security On or Off on page 1-26

1.6.1 About Service Request Security

The standard service data security provided with your application, makes it possible for you to restrict by Responsibility which users can create and access what types of service requests and related information.

To set it up, you need to map responsibilities to Service Request Types and turn the standard security on.

The mappings prevent users from creating, viewing, and modifying all service request data related to the Service Request Types not mapped to their Responsibility. This includes service request tasks, notes, and interaction history. It

even prevents users from viewing relationships of a service request to other service requests of types they cannot access.

Users without access to a Service Request Type are also excluded from the lists of resources other agents use to assign service request ownership and tasks for that Service Request Type.

The standard service data security is turned off by default. When you set up the Responsibility mappings and turn it on, it secures service request data not just in Oracle TeleService, but in all applications that use service requests. (See How Turning on Standard Service Security Impacts Other Applications on page 1-20.)

Turning service security on or off does not affect objects such as tasks and notes that are not attached to service requests.

Service data security is built using standard Oracle applications data security. This means you can create your own custom security by following the procedures outlined in the Managing Oracle Applications Security chapter of the *Oracle Applications System Administrator's Guide*.

1.6.1.1 How Turning on Standard Service Security Affects Other Applications

Turning on security affects all applications and Oracle application foundation modules that use service requests to different degrees:

- **Oracle iSupport**

Customers creating service requests on the Web are subject to Oracle iSupport's own security which is based on the customer: customer contacts have access only to service requests for their organization.

You can create Responsibility to Service Request Type mappings to prevent customer contacts from creating service requests of types not mapped to their Responsibility. However, this restriction is for creation only. Those contacts are not restricted from viewing or updating any service request permitted by Oracle iSupport security.

When agents work with the customer-created service requests in Oracle TeleService, however, they are subject to full standard security restrictions (the same as for any other service request.)

- **Tasks**

Tasks enforces standard service security only partially. Task standalone forms display all service request tasks regardless of the Service Request Type. However, agents are prevented from making updates in all Task windows.

- Assignment Manager

The Assignment Manger enforces standard service security fully. This means this module assigns only resources that have access to the Service Request Type.

- Oracle Inbound

If you have set up an Interactive Voice Recognition (IVR) system to route calls based on customer entering service request numbers, then these calls are routed only to agents who have access to service requests of this type.

Agents transferring calls regarding service requests to other agents are restricted to transferring the calls only to agents with access to the Service Request Type.

All telephony implementations must map at least one agent in the call center to each Service Request Type coming through the call center.

- Universal Work Queue

The UWQ enforces standard security fully. This means:

- * Work queues of each agent display only those service requests of types the agent can access.
- * The number of service requests displayed in each node sums up only information agents can access.
- * The tasks nodes display all tasks, including all service request tasks. However, the agent cannot view the details of service request tasks they cannot access.
- * The Next Work and Request Work buttons assign only work the user can access.

- Oracle Depot Repair

Oracle Depot Repair enforces service security fully.

- Oracle Enterprise Asset Management

Users associating work orders to service requests can only see and select those service requests of types they can access.

- Oracle Install Base

Oracle Install Base usually permits users to view all the service requests logged for a customer's product. Turning the standard security restricts that view to those service requests of types mapped to the Responsibility.

- Oracle Daily Business Intelligence
With standard security on, this application prevents users from seeing information on Service Request Types not tied to their Responsibility.

1.6.2 Setting Up Service Request Data Security

Use this high-level procedure to guide your implementation of the service request security.

To set up data security for service request data:

1. If you wish to use the standard security provided with your application, then:
 - a. Navigate to Setup > Service Requests > Type-Responsibility Mapping and map each Responsibility to the Service Request Types you wish users to access. Unmapped responsibilities cannot view or modify any service requests or related objects. For detailed procedures, see Mapping Responsibilities to Service Request Types on page 1-22.
 - b. Navigate to Setup > Service Requests > Service System Parameters and turn standard security on. For details, see Turning Security On or Off on page 1-26.
2. If you do not wish to implement standard security, and instead wish to implement custom data security of your own, then:
 - a. Create custom security according to procedures described in the Managing Oracle Applications Security chapter of the *Oracle Applications System Administrator's Guide*. See Creating Your Own Custom Security on page 1-27 for guidelines.
 - b. Navigate to Setup > Service Requests > Service System Parameters and turn the custom security on by selecting **Custom Security** from the Service Request Security drop-down list. For details, see Turning Security On or Off on page 1-26.

1.6.3 Mapping Responsibilities to Service Request Types

This group of procedures describes how to create the mappings between responsibilities and Service Request Types:

- Displaying Existing Responsibility Mappings on page 1-23
- Creating a New Responsibility Mapping on page 1-24

- Updating a Responsibility Mapping on page 1-25

1.6.3.1 Displaying Existing Responsibility Mappings

Use this procedure to view existing Responsibility mappings.

To display existing mappings:

1. Navigate to Setup > Service Requests > Type-Responsibility Mapping.

The Service Responsibility Setup page appears in a browser window listing any existing mappings.

Responsibility	Application	Start Date	End Date	Classification	Access	Update	Remove
Alert Manager, Progress S&L	Oracle Alert	07-01-1999		Service Provider	Select Request Type		
Customer Support, Vision Enterprises	Support	01-13-2000		Service Provider	Select Request Type		
Customer Support, Vision Process	Support	06-06-2002		Service Provider	Select Request Type		
Depot Repair Super User	Depot Repair	07-30-1999		Service Provider	Select Request Type		
Preventive Maintenance Reports	Field Service	02-05-2003		Service Provider	Select Request Type		

2. By default, the page displays only active mappings. You can change the view by making an alternate selection from the View drop-down box:
 - **All:** Includes active, inactive, and planned mappings.
 - **Planned:** Limits the display to mappings that are not yet in effect.
 - **Active:** (the default) Displays only mappings that are currently in effect.
3. From this page you can:
 - Create a new Responsibility mapping by clicking **Add Responsibility**. See Creating a New Responsibility Mapping on page 1-24 for details.
 - Update an existing mapping by clicking **Update**. See Updating a Responsibility Mapping on page 1-25.
 - Delete a mapping by clicking **Remove**.

1.6.3.2 Creating a New Responsibility Mapping

Use this procedure to create a new Responsibility mapping.

To map a Responsibility:

1. Navigate to Setup > Service Requests > Type-Responsibility Mapping.
The Service Responsibility Setup page appears in a browser window.
2. Click **Add Responsibility**.

The Step 1 Add Service Responsibility page appears.

3. Select the Responsibility you wish to map using the Responsibility List of Values.
4. Use the Classification drop-down list to specify if the mapping is intended for agent-facing service applications (Service Provider) or for Oracle iSupport (Self Service User).

If you select Self Service User, you are restricted to mapping only those Service Request Types that have been set up in the Service Request Types window with the Web Entry check box selected. See Setting Up Service Request Types on page 1-15 for details.

5. Select the type of mapping you wish to create using the Access drop-down box:
 - If you wish to grant this Responsibility access to all Service Request Types, then select **All Request Types**. If you have selected Self Service User in the last step, then you are mapping the Responsibility only to those Service Request Types that are specified for web entry.

Note: Granting All Request Types access provides access not only to all existing Service Request Types, but also all of those created in the future.

- If you wish to enable access for this Responsibility to one or more Service Request Types, then select **Select Service Request Type**.
6. Click **Continue**.

Step 2 Map Responsibility to Service Request Types page appears.
 7. If you selected All Request Types, the page lists all of the Service Request Types. If you wish to limit any of the Service Request Types to using a specific a Status Group, then:
 - a. Select the Status Group.

The selection you make here overrides for users of this Responsibility any mapping you have made in the Service Request Statuses window. If you do not make a mapping here, the application automatically uses any mappings you have entered in the Service Request Types window.
 - b. Click **Finish**.
 8. If you selected Select Request Type, then select the types:
 - a. Click **Add Another Row**.
 - b. Select a Service Request Type.
 - c. If you wish to limit this Responsibility to using a specific a Status Group, then select it using the Status Group drop-down list. The selection you make here overrides for users of this Responsibility any mapping you have made in the Service Request Statuses window. If you do not make a mapping here, the application automatically uses any mappings you have entered in the Service Request Types window.
 - d. Optionally, enter dates in the Start Date and End Date fields if you to restrict the availability of this mapping.
 - e. Click **Add Another Row** to add the next type or **Finish** to save your entries and return to the Service Responsibility Setup page.

1.6.3.3 Updating a Responsibility Mapping

Use this procedure to update a Responsibility to Service Request Types mapping.

To update a Responsibility mapping:

1. Navigate to Setup > Service Requests > Type-Responsibility Mapping.
The Service Responsibility Setup page appears in a browser window.
2. If you wish to change the Classification or Access type for this mapping, then:
 - a. Click **Update Responsibility**.
The Update Responsibility Setup window appears.
 - b. Here you can select a different access type, and classification.
 - c. Click **Apply**.
You are returned to the Mapping of Responsibility to Service Request Types window.
3. Click **Update** next to the mapping you wish to update.
The Mapping of Responsibility to Service Request Types page appears.
On this page you can:
 - Remove a Service Request Type from the mapping, by entering an end date.
 - Specify a service request Status Group.
 - Map additional types using the **Add Another Row** button.

1.6.4 Turning Security On or Off

Use this procedure to turn on or off service request security.

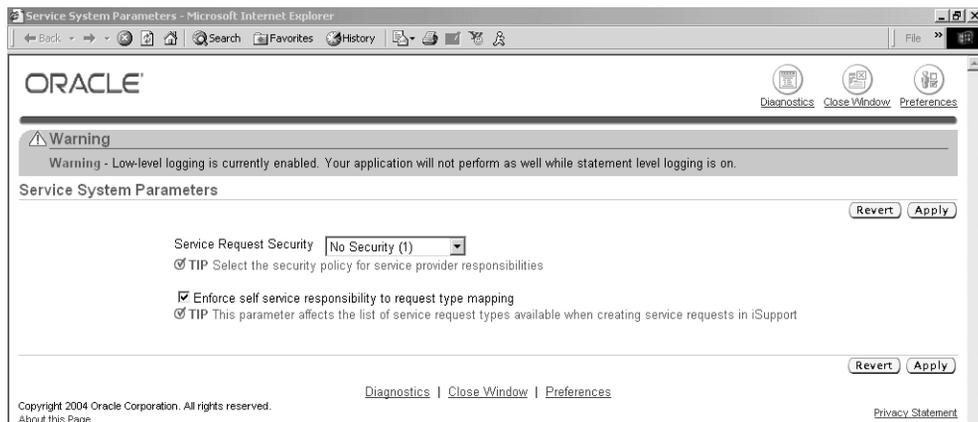
Prerequisites:

You must map Service Request Types to responsibilities or create your own custom security framework before turning security on as a second step. Turning security on as a first step prevents all users from accessing service requests, tasks, and other related business objects.

To turn on security:

1. Navigate to Setup > Service Requests > Service System Parameters.
The application displays the Service System Parameters page in a new browser window.

Note: Only the Security region relates to security. The second Self Service region, is for restricting customer access to Service Request Types during service request creation in Oracle iSupport. See *Enabling Responsibility Mappings for Oracle iSupport* on page 1-28.



2. Using the Service Request Security drop-down box, select one of the following:
 - **No Security**, if you wish to turn off security and make all service requests and related tasks available to users.
 - **Standard Security**, if you wish to enable security supplied with the application.
 - **Custom Security**, if you wish to disable the seeded security and turn on your own custom security.
3. Click **Apply**.

1.6.5 Creating Your Own Custom Security

Your organization can create its own custom security framework according to the concepts and procedures described in the Managing Oracle Applications Security chapter of the *Oracle Applications System Administrator's Guide*.

For example, you may wish to:

- Restrict the ability of users to view service requests by status.

Limiting users to only viewing service requests with the status of Open, for example. You can do so, by inserting a where clause in the SQL statement of the object instance set predicate.

- Restrict access to service requests, tasks, and other business objects to specific responsibilities or individuals

You can accomplish this by selecting a more restricted grantee such as a Responsibility or a resource. By default, all seeded grantees are Global.

The custom security you create replaces the standard security provided with your application.

You can use the seed data for standard security as a guide for creating custom security. See Standard Service Security Seed Data on page E-9 lists standard security seed data you can use as a guide.

1.7 Enabling Responsibility Mappings for Oracle iSupport

You can restrict customer contacts from creating service requests by Service Request Type. To do so, you create the same Responsibility to Service Request Type mappings used in standard service security and then turn on the mappings using the procedure below.

Prerequisites

You must map Oracle iSupport responsibilities to Service Request Types that have been specified as Web Enabled. (See Mapping Responsibilities to Service Request Types on page 1-22.)

To use mappings to restrict request creation in Oracle iSupport:

1. Navigate to Setup > Service Requests > Service System Parameters.

The application displays the Service System Parameters page in a new browser window.

2. To restrict Oracle iSupport users to creating service requests of types mapped to their Responsibility, select the **Only Service Request Types Mapped to User's Responsibility** radio button. This restricts only the creation of service requests; not the ability to access existing requests.

2. Enter a severity name in the Severity field in the header of the Service Request window.
3. Enter a numerical value in the Importance Level field. The importance level indicates the importance of this particular severity with respect to other defined severities.

If you are implementing automatic workload balancing for automatic work assignment, then you must group the severities into four categories: 1 through 4, where 1 are the severities of the highest priority and 4 are those with the least priority. See the Implementing Service Request and Task Assignment chapter of this guide for more information.

4. Enter an optional description of the severity.
5. If you are enabling the pull version of autoassignment where agents assign work to themselves in the Universal Work Queue using the Get Work and Next Work buttons, then you must use the Priority Code LOV to select one of the four priorities: critical, high, medium, or low.

The application uses the priority you enter here together with the service request due date to calculate the most urgent work item to assign to agents when they click the Get Work and Next Work buttons.

The Priority Code maps onto the Global Priority Levels in the Universal Work Queue.

For more information on autoassignment topics, see the Implementing Service Request and Task Assignment chapter of this guide.

6. Optionally, enter Start and End dates to control the use of severities. By specifying a future start date you can delay the use of a new severity. You can inactivate a severity by setting an end date.
7. Optionally, select a text color in the Text Color field. The severity will be shown in this color on the service request window.
8. If a descriptive flexfield has been enabled for this form, select the appropriate values.
9. Save your service request severity.

1.9 Setting Up Service Request Urgencies

You define service request urgencies to provide an indicator of the customer's perception of the urgency of the service request. Urgency is an optional field in service requests.

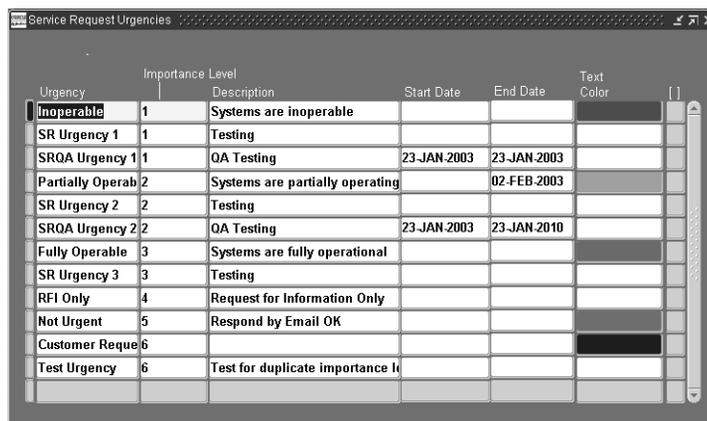
Following are some examples of service request urgencies:

- Inoperable
- Partially Operable
- Not Urgent

To set up service request urgencies:

1. Navigate to Setup > Service Requests > Request Urgencies.

The Service Request Urgencies window appears.



Urgency	Importance Level	Description	Start Date	End Date	Text Color
Inoperable	1	Systems are inoperable			
SR Urgency 1	1	Testing			
SRQA Urgency 1	1	QA Testing	23-JAN-2003	23-JAN-2003	
Partially Operab	2	Systems are partially operating		02-FEB-2003	
SR Urgency 2	2	Testing			
SRQA Urgency 2	2	QA Testing	23-JAN-2003	23-JAN-2010	
Fully Operable	3	Systems are fully operational			
SR Urgency 3	3	Testing			
RFI Only	4	Request for Information Only			
Not Urgent	5	Respond by Email OK			
Customer Reque	6				
Test Urgency	6	Test for duplicate importance l			

2. Enter an urgency name in the Urgency field. The urgency name appears in the Urgency list of values in the Service Request Workbench tab.
3. Enter a numerical value in the Importance Level field. The importance level indicates the importance of this particular urgency with respect to other defined urgencies and must contain a unique value.
4. Enter a description of the urgency.

5. Optionally, enter Start and End dates to control the use of urgencies. By specifying a future start date you can delay the use of a new urgency. You can inactivate an urgency by setting an end date.
6. Select a text color in the Text Color field. The urgency will be shown in this color on the service request window.
7. If a descriptive flexfield has been enabled for this form, select the appropriate values.
8. Save your service request urgency.

1.10 Defining Service Request Problem Codes

Service request problem codes provide service agents with a standard way to classify customer requests.

For example:

- Hardware Problem
- Software Problem
- Shipping Damage

Agents can enter one problem code per service request using the Problem Code list of values. Entry is optional by default.

Problem codes are implemented using the standard Oracle Applications lookup code of type REQUEST_PROBLEM_CODE. The associated lookup codes are user definable.

Prerequisites

If you plan to use a large number of problem codes in your organization, you can restrict agents to seeing only those problem codes that are relevant to the customer problem they are resolving. This is accomplished by mapping problem codes to Service Request Types, items, and item categories. If you plan to create the mappings, you should plan them out before creating the problem codes. See Restricting the Use of Problem Codes on page 1-34.

To set up service request problem codes:

1. Navigate to Setup > Service Requests > Problem Codes.

The Oracle Service: Service Request Problem Codes Lookups window appears, displaying all problem codes.

Oracle Service: Service Request Problem Codes Lookups

Type: **REQUEST_PROBLEM_CODE**
 Meaning: **Service Request Problem Codes**
 Application: **Oracle Service**
 Description: **Service Request Problem codes for Service Request fo**

Access Level:
 User
 Extensible
 System

Effective Dates: From To Enabled

Code	Meaning	Description	Tag	From	To	Enabled
EE01	Electrical Problem	Electrical Problem		22-AUG-2000		<input checked="" type="checkbox"/>
HDWR	Hardware Problem	Hardware Problem En		03-SEP-2000		<input checked="" type="checkbox"/>
MM01	Mechanical Problem	Mechanical Problem		22-AUG-2000		<input checked="" type="checkbox"/>
NOISE	Noise Problem	Product is producing r		03-SEP-2000		<input checked="" type="checkbox"/>
PC	PC Problems	PC Problems (Added)		31-AUG-2000		<input checked="" type="checkbox"/>
SHIP1	Shipping Damage	Product was damagec		31-AUG-2000		<input checked="" type="checkbox"/>
SR PC 1	SR Problem Code 1	Testing		17-SEP-2002		<input checked="" type="checkbox"/>
SRQAPC1	SR Problem Code 11	Testing QA		23-JAN-2003		<input checked="" type="checkbox"/>
SW01	Software Problem	Software Problem		22-AUG-2000		<input checked="" type="checkbox"/>

2. Enter a problem code in the Code field.
3. Enter a meaning. A meaning is a brief description of the code.
4. Optionally, enter a full description of the code in the Description field.
5. Optionally, enter Start and End dates to control the use of problem codes. By specifying a future start date you can delay the use of a new problem code. You can inactivate a problem code by setting an end date.
6. The Tag field is not used for problem codes.
7. Select the Enabled check box to make the code is available for use.
8. Optionally, enter the descriptive flexfield, if defined.
9. Save your problem code.
10. After you complete entering your problem codes, you may wish to restrict their use by mapping them to Service Request Types, inventory items, and item categories. See Restricting the Use of Problem Codes on page 1-34.

1.11 Restricting the Use of Problem Codes

This group of topics explains how you can make it easier for agents to select the correct problem code for a customer problem by restricting their use. It covers:

- About Mapping Problem Codes on page 1-34
- Displaying Problem Code Mappings on page 1-35
- Viewing Unmapped Problem Codes on page 1-37
- Creating a New Problem Mapping on page 1-38
- Updating the List of Problem Codes for a Mapping on page 1-39
- Removing Unwanted Mappings From Use on page 1-40

1.11.1 About Mapping Problem Codes

Problem codes permit agents to accurately classify customer problems. Because the list of all problem codes can be large, you can use the procedures in this section to narrow an agent's choice to only those problem codes appropriate to each customer problem. You can do this by mapping problem codes to Service Request Types, inventory items (individual items or categories), or a combination of the two.

For example, if you have customers calling in with billing questions or computer hardware problems, then you may wish to map the available problem codes to the two Service Request Types to prevent an agent from accidentally making the wrong problem code entry. You do not want an agent to enter "Incorrect labor rate" in a service request about a faulty hard drive, for example, or "Replacement needed" for a billing question.

You may wish to restrict the use of problem codes further by inventory item category to prevent an agent from using the wrong problem code for a particular product, for example, using "New battery required" for a service request that involves the replacement of the hard drive.

If you do not create a mapping for a problem code, agents can use it in any service request.

You can map problem codes to the following valid permutations:

- A Service Request Type alone
- An inventory item alone
- An inventory item category alone

- A Service Request Type and an inventory item
- A Service Request Type and an inventory item category

Example

Suppose you create eight problem codes, A through H, and two mappings:

- **Mapping 1:** Problem codes A, B, and C to Service Request Type T1
- **Mapping 2:** Problem codes D and E to T1 and inventory item P1

You leave problem codes F, G, and H unmapped.

Here are the available problem codes for an agent creating a service request:

- If an agent does not enter either Service Request Type T1 or product P1, then the available problem codes are limited to the unmapped problem codes F, G, and H.
- Agents entering item P1 with different Service Request Types are also limited to the unmapped problem codes.

There is no mapping defined for item P1 alone, so entering the item without the Service Request Type T1 does not make any difference.

- If the agent selects Service Request Type T1 but does not enter the item P1, then the available problem codes are: A, B, and C as well as the unmapped problem codes F, G, and H.
- If the agent selects type T1 and item P1, then the available problem codes are: A,B,C, D, and E as well as the unmapped problem codes F, G, and H.

A, B, and C are valid for Service Request Type T1 and all inventory items.

D and E are valid for the T1 and P1 combination.

1.11.2 Displaying Problem Code Mappings

Use this procedure to view the existing problem code mapping setup.

To display problem code mappings:

1. Navigate to Setup > Service Requests > Problem Code Mapping.

The Problem Code Mapping page displays in a browser window listing any existing problem code mappings.

ORACLE[®] Diagnostics Close Window Preferences

Preferences

Preferences > Problem Code Mapping

Problem Code Mapping Revert Apply

* View Active Unmapped Problem Codes Create Problem Code Mapping

Request Type	Product Category	Product	Start Date	End Date	Update Problem Code Mapping
CMRO Service Request	CRM		13-Oct-2003		
		75100001			
Defective Product					
Defective Product					
Defective Product					
Customer Call					
Customer Call					
Customer Call					

2. Select a view from the View drop-down list:
 - **Active:** to view all mappings in effect.
 - **All:** to view all current, planned, and end-dated mappings.
 - **Planned:** to view only mappings that have a future start date.
3. If you wish to create a new mapping, you can view a list of unmapped problem codes first and select those you wish to map by clicking **Unmapped Problem Codes**. Or, if you know which codes you want to map, you can skip this step and create the mapping directly by clicking **Create Problem Code Mapping**. See *Creating a New Problem Code Mapping* on page 1-38 for details.
4. If you wish to update the list of problem codes for an existing mapping, then click the **Update Problem Code Mapping** (the pencil icon) next to the item you wish to update. You cannot update the mapped objects, only the list of codes. See *Updating the List of Problem Codes for a Mapping* on page 1-39.
5. If you wish to disable a particular mapping or make it available only at a future time, then enter a date in the End Date or Start Date fields and click **Apply**. End-dating a mapping is useful if you have made an error in your setup as it frees up mapped problem codes for reuse.

1.11.3 Viewing Unmapped Problem Codes

Use this procedure to view all of the unmapped problem codes and select a group of them for mapping.

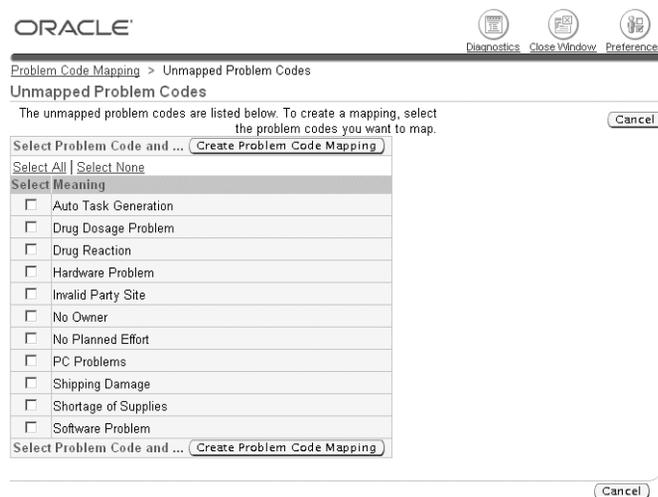
Prerequisites

Display existing mappings by navigating to Setup > Service Requests > Problem Code Mapping

To view unmapped problem codes:

1. Click **Unmapped Problem Codes** in the Problem Code Mapping page.

The Unmapped Problem Codes page appears listing the codes available for mapping.



2. If you wish to create a mapping, then:
 - a. Select the codes you wish to map using the check boxes.
 - b. Click **Create Code Mapping**.

The Create Problem Mapping Page appears. There you can select the Service Request Type and item or item category combination for your mapping. See [Creating a New Problem Code Mapping](#) on page 1-38 for details.

1.11.4 Creating a New Problem Code Mapping

Use this procedure to create a new problem code mapping.

Prerequisites

- You must first set up Service Request Types, problem codes, and inventory items, and item categories.
- Display existing mappings by navigating to Setup > Service Requests > Problem Code Mapping.

To create a new problem code mapping:

1. There are two ways to create a problem code mapping from the Problem Code Mapping page:
 - You can view a list of problem codes that are not already mapped by clicking **Unmapped Problem Codes** and select those you wish to map. This method is preferable if you have many codes to map or are not sure which are available for mapping. See *Viewing Unmapped Problem Codes* on page 1-37.
 - If you know which problem codes you wish to map, then click **Create Problem Code Mapping**.

The Create Problem Mapping page appears.

ORACLE

Close Window Preferences Help

Problem Code Mapping > Create Problem Code Mapping

Create Problem Code Mapping

Select the criteria for problem codes. The Service Request User Interface Screens will display all matching problem codes plus any unmapped problem codes in the Service Request page.

Request Type

Product Relationship None Item Item Category

Start Date

End Date

Problem Codes

Problem Code	Description	Start Date	End Date	Remove
No data exists.				
<input type="button" value="Add Another Row"/>				

2. Select the object or combination of objects you wish to map. You can map problem codes to a Service Request Type alone or in combination with either an item or an item category:
 - If you wish to map problem codes to a Service Request Type, then select the type using the Request Type list of values (the flashlight icon).
 - If you wish to map to an inventory item or an item category, then select either the Item or the Item Category radio button and use the list of values to make your selection.
3. If you wish to limit the availability of this mapping, then enter dates in the Start Date and End Date fields.
4. Enter any additional problem codes you wish to map. For each code:
 - a. Click **Add Another Row**.
 - b. Select the problem code using the Problem Code drop-down list.

Note: The drop-down list lists all problem codes, including those already mapped. If you select a mapped code by accident, you will receive an error when saving this mapping.

5. If you wish to remove any mapped code, you can do so by clicking **Remove**. You can remove codes only before you save the mapping.
6. Click **Apply** when you are done.

1.11.5 Updating the List of Problem Codes for a Mapping

Use this procedure to update the list of problem codes for a mapping. You cannot modify the objects mapped to the codes, only add or remove problem codes from the list.

Prerequisites

Display existing mappings by navigating to Setup > Service Requests > Problem Code Mapping

To update the list of problem codes in a mapping:

1. Click **Update Problem Code Mapping** in the Problem Code Mapping page.

The Update Problem Mapping page appears listing existing mappings.

ORACLE

Diagnostics Close Window Preferences Help

Update Problem Code Mapping

Request Type **CMRO Service Request**

Product Category **CRM**

Product

Start Date **13-Oct-2003**

End Date

Problem Codes

View **Active**

Problem Code	Description	Start Date	End Date
Mechanical Problem	Mechanical Problem	<input type="text"/>	<input type="text"/>
Noise Problem	Product is producing noise	<input type="text"/>	<input type="text"/>

2. If you wish to remove an existing problem code, then enter an end date.
3. If you wish to add a problem code to the list, then:
 - a. Click **Add Problem Codes**.
Add Problem Codes page appears.
 - b. Click **Add Another Row**.
 - c. Select the code you wish to add using the Problem Code drop-down list.
 - d. Repeat the above two steps for all of the codes you wish to add.
 - e. If you wish to remove any of the items you have added, you can do so by clicking **Remove** (the pencil with eraser and paper icon).
 - f. Click **Apply** when you are done.
4. Click **Apply**.

1.11.6 Removing Unwanted Mappings From Use

While you cannot delete mappings after you save them, you can remove mappings from use by entering a recent date in the End Date field on the Problem Code Mapping page.

To remove unwanted problem code mappings from use:

1. Navigate to Setup > Service Requests > Problem Code Mapping.

The Problem Code Mapping page displays in a browser window listing any existing problem code mappings.

2. Enter a recent date in the End Date field of the mapping you wish to disable.
3. Click **Update**.

1.12 Setting Up Service Request Resolution Codes

Resolution codes provide a uniform way for agents to specify how a service request is resolved. For example:

- Unit Replaced
- Patch Sent
- Documentation Sent

Agents can enter one resolution code per service request using the Resolution Code list of values. Entry is optional by default.

Resolution codes are implemented using the standard Oracle Applications lookup code of type REQUEST_RESOLUTION_CODE. The associated lookup codes are user definable.

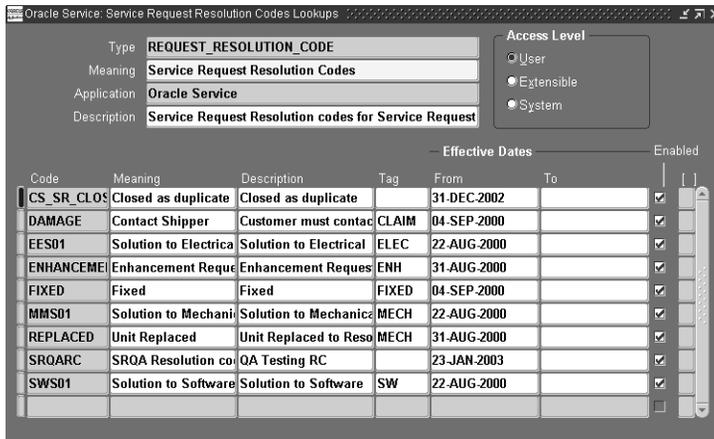
Prerequisites

If you plan to use a large number of resolution codes in your organization, you can restrict agents to seeing only those that are relevant to the customer problem. This is accomplished by mapping resolution codes to problem codes, Service Request Types, items, and item categories. For information about mapping resolution codes, see *Specifying the Use of Resolution Codes* on page 1-42.

To set up service request resolution codes:

1. Navigate to Setup > Service Requests > Resolution Codes.

The Service Request Resolution Codes window appears displaying any existing resolution codes.



2. Enter the resolution codes:
 - a. Click **New** in the toolbar.
 - b. Enter a single word as the code in the Code field. This is for internal use by the application.
 - c. Enter the wording you wish agents to see in the list of values in the Meaning field.
 - d. Optionally, enter a description in the Description field.
 - e. If you wish to restrict the availability of the code, then start or end dates. By specifying a future start date you can delay the use of a new resolution code. You can inactivate a resolution code by setting an end date.
 - f. The Tag field is not used for resolution codes.
 - g. Select the Enabled check box to make the code available for use.
 - h. Optionally, you can enter a descriptive flexfield if one has been set up for this purpose.
3. Save your resolution codes by clicking **Save** in the toolbar.

1.13 Specifying the Use of Resolution Codes

Resolution codes provide agents with a standard way of specifying in a service request the action taken to resolve a customer problem. The topics in this section

explain how you can reduce agent error and improve efficiency by specifying which resolution codes can be used with which Service Request Types. These are:

- About Mapping Resolution Codes on page 1-43
- Displaying Resolution Code Mappings on page 1-44
- Viewing Unmapped Resolution Codes on page 1-45
- Creating a New Resolution Code Mapping on page 1-46
- Updating the List of Resolution Codes for a Mapping on page 1-48
- Removing Unwanted Mappings From Use on page 1-49

1.13.1 About Mapping Resolution Codes

You can specify which resolution codes are relevant to which service requests by mapping resolution codes to problem codes, Service Request Types, inventory items (individual items or categories), or a combination of the three.

You can map resolution codes to the following valid permutations:

- A Service Request Type alone
- An inventory item alone
- An inventory item category alone
- A problem code alone
- A Service Request Type and an inventory item
- A Service Request Type and an inventory item category
- A Service Request Type and a problem code
- An inventory item and a problem code
- An inventory item category and a problem code
- A Service Request Type, an inventory item, and a problem code
- A Service Request Type, an inventory item category, and a problem code

For example, if customers calling about their computer hard drives failing have drives from different manufacturers that are mutually incompatible, you may wish to create separate resolution codes for each manufacturer. Then, by creating a mapping for each problem code and drive manufacturer, you can ensure agents select the correct resolution code.

Suppose you have three brands of hard drives Toshiba HD, IBM HD, and Seagate HD. You may wish to create three resolution code mappings:

Mapping	Problem Code	Item Category	Mapped Resolution Codes
Mapping 1	Hard Drive Failed	Toshiba HD	<ul style="list-style-type: none"> ■ Replaced Drive T ■ Repaired Drive T ■ Reformatted Drive T
Mapping 2	Hard Drive Failed	IBM HD	<ul style="list-style-type: none"> ■ Replaced Drive IBM ■ Repaired Drive IBM ■ Reformatted Drive IBM
Mapping 3	Hard Drive Failed	Seagate HD	<ul style="list-style-type: none"> ■ Replaced Drive S ■ Repaired Drive S ■ Reformatted Drive S

This mapping ensures that agents select the correct resolution code for each hard drive make.

Agents can use unmapped resolution codes in all service requests.

1.13.2 Displaying Resolution Code Mappings

Use this procedure to view the existing resolution code mapping setup.

To display resolution code mappings:

1. Navigate to Setup > Service Requests > Resolution Code Mapping.

The Resolution Code Mapping page displays in a browser window listing any existing resolution code mappings.

ORACLE Close Window Preferences

Resolution Code Mapping Revert Apply

* View ACTIVE Unmapped Resolution Codes Create Resolution Code Mapping

Request Type	Product Category	Product	Problem Code	Start Date	End Date	Update Resolution Code Mapping
VTEST				15-Oct-2003	30-Oct-2003	✎

Revert Apply

2. Select a view from the View drop-down list:
 - **Active:** to view all mappings in effect.
 - **All:** to view all current, planned, and end-dated mappings.
 - **Planned:** to view only mappings that have a future start date.
3. If you wish to create a new mapping, you can view a list of unmapped resolution codes and select those you wish to map by clicking **Unmapped Resolution Codes**. Or, if you know which codes you want to map, you can skip this step and create the mapping directly by clicking **Create Resolution Code Mapping**. See *Creating a New Resolution Code Mapping* on page 1-46 for details.
4. If you wish to update the list of resolution codes for an existing mapping, then click the **Update Resolution Code Mapping** (the pencil icon) next to the item you wish to update. You cannot update the mapped objects, only the list of codes. See *Updating the List of Resolution Codes for a Mapping* on page 1-48.
5. If you wish to disable a particular mapping or make it available only at a future time, then enter a date in the End Date or Start Date fields and click **Apply**. End-dating a mapping is useful if you have made an error in your setup as it frees up mapped codes for reuse.

1.13.3 Viewing Unmapped Resolution Codes

Use this procedure to view all of the unmapped resolution codes and select a group of them for mapping.

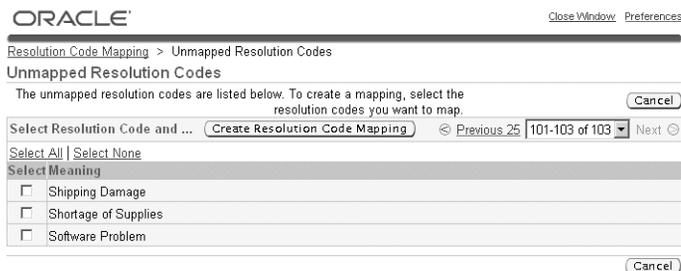
Prerequisites

Display existing mappings by navigating to Setup > Service Requests > Resolution Code Mapping

To view unmapped resolution codes:

1. Click **Unmapped Resolution Codes** in the Resolution Code Mapping page.

The Unmapped Resolution Codes page appears listing the codes available for mapping.



2. If you wish to create a mapping, then:
 - a. Select the codes you wish to map using the check boxes.
 - b. Click **Create Resolution Code Mapping**.

The Create Resolution Mapping Page appears. Complete your mapping by following the procedure Creating a New Resolution Code Mapping on page 1-38.

1.13.4 Creating a New Resolution Code Mapping

Use this procedure to create a new resolution code mapping.

Prerequisites

- You must first set up Service Request Types, problem codes, resolution codes, inventory items, and item categories.
- Display existing mappings by navigating to Setup > Service Requests > Resolution Code Mapping

To create a new resolution code mapping:

1. There are two ways to create a mapping from the Resolution Code Mapping page:

- You can view a list of unmapped resolution codes by clicking **Unmapped Resolution Codes** and select those you wish to map. This method is preferable if you have many codes to map or are not sure which are available for mapping. See Viewing Unmapped Resolution Codes on page 1-37.
- If you know which resolution codes you wish to map, then click **Create Resolution Code Mapping**.

The Create Resolution Code Mapping page appears.

ORACLE Close Window Preferences

Display Preferences > Unmapped Resolution Codes > Create Resolution Code Mapping

Create Resolution Code Mapping

Select the criteria for resolution codes. The Service Request User Interface Screens will display all matching resolution codes plus any unmapped resolution codes in the Service Request page. Cancel Apply

Request Type

Product Relationship None Item Item Category

Problem Code

Start Date

End Date

Resolution Codes

*Resolution Code	Description	Start Date	End Date	Remove
[-] CSSR1		<input style="width: 80px;" type="text" value=""/>	<input style="width: 80px;" type="text" value=""/>	<input style="width: 40px;" type="text" value=""/> <input style="width: 40px;" type="text" value=""/>
[-] CSSR11		<input style="width: 80px;" type="text" value=""/>	<input style="width: 80px;" type="text" value=""/>	<input style="width: 40px;" type="text" value=""/> <input style="width: 40px;" type="text" value=""/>
[-] CSSR12		<input style="width: 80px;" type="text" value=""/>	<input style="width: 80px;" type="text" value=""/>	<input style="width: 40px;" type="text" value=""/> <input style="width: 40px;" type="text" value=""/>

Add Another Row

Cancel Apply

2. Select the object or combination of objects you wish to map:
 - If you wish to map resolution codes to a Service Request Type, then select the type using the Request Type list of values (the flashlight icon).
 - If you wish to map an inventory item or an item category, then select either the Item or the Item Category radio button and use the list of values to make your selection.
 - If you wish to map a problem code, then select a problem code.
3. If you wish to limit the availability of this mapping, then enter dates in the Start Date and End Date fields.
4. Enter any additional resolution codes you wish to map. For each code:
 - a. Click **Add Another Row**.

- b. Select the code using the Resolution Code drop-down list.

Note: The drop-down list lists all resolution codes, including those already mapped. If you select a mapped code by accident, you will receive an error when saving this mapping.

5. If you wish to remove any mapped code, you can do so by clicking **Remove**. You can remove codes only before you save the mapping.
6. Click **Apply** when you are done.

1.13.5 Updating the List of Resolution Codes for a Mapping

Use this procedure to update the list of resolution codes in a mapping. You cannot modify the objects mapped to the codes, only add or remove resolution codes from the list.

Prerequisites

Display existing mappings by navigating to Setup > Service Requests > Resolution Code Mapping

To update the list of resolution codes in a mapping:

1. Click **Update Resolution Code Mapping** in the Resolution Code Mapping page.

The Update Resolution Code Mapping page appears listing existing mappings.

2. If you wish to remove a mapped resolution code, then enter an end date.
3. If you wish to add a resolution code to the mapping, then:
 - a. Click **Add Resolution Codes**.
Add Resolution Codes page appears.
 - b. Click **Add Another Row**.
 - c. Select the code you wish to add using the Resolution Code drop-down list.
 - d. Repeat the above two steps for all of the codes you wish to add.
 - e. If you wish to remove any of the items you have added, you can do so by clicking **Remove** (the pencil with eraser and paper icon).
 - f. Click **Apply** when you are done.

4. Click **Apply**.

1.13.6 Removing Unwanted Mappings From Use

While you cannot delete mappings after you save them, you can remove mappings from use by entering a recent date in the End Date field on the Resolution Code Mapping page.

To remove unwanted resolution code mappings from use:

1. Navigate to Setup > Service Requests > Resolution Code Mapping.
The Resolution Code Mapping page displays in a browser window listing any existing resolution code mappings.
2. Enter a recent date in the End Date field of the mapping you wish to disable.
3. Click **Update**.

1.14 Capturing Additional Service Request Attributes

This group of topics explains how to set up the capture of additional service request information (attributes) in a structured question and answer format at the time of service request creation. You can use the information for automatic duplicate checking and task creation.

For a general explanation of attributes see About Additional Attributes on page 1-49.

For an overview of the setup steps see Overview of Attribute Setup on page 1-51.

The remaining topics explain individual setup steps:

- Creating Prompts and Questions on page 1-51
- Creating Lists of Value for the Answers on page 1-52
- Setting Up Attributes for a Service Request Type on page 1-53
- Enabling Attribute Capture in Oracle iSupport on page 1-56

1.14.1 About Additional Attributes

You can require agents or customers creating a service request to enter additional information in response to a set of prompts or questions. Obtaining additional information in this structured format is especially important for reporting problems

that do not involve inventory or installed base items and permits the application to take action based on the information provided.

For example, a government agency receiving a call about an abandoned vehicle must capture the make, model, color, and the license plate number so the towing service knows which vehicle to tow away and what tow truck to send to do the job.

Based on the information entered, the application can:

- Automatically create different tasks

For example, you can set up the application to create a task to send a different type of tow truck depending on whether the abandoned vehicle is a passenger car or a bus.

- Automatically check if the new service request is a duplicate

You can have the application automatically check past service requests for potential duplicates. Has anyone else called about an abandoned car with the same make, model, and color within the last ten days?

You can capture the additional attributes for service requests created by agents in the Service Request tab of the Contact Center or by customers in Oracle iSupport.

Note 1: The capture of additional attributes is not available for service requests created in the Service Request window or in other applications, including Oracle Depot Repair and Oracle eMail Center. Agents creating service requests in these modules may still see the same Service Request Types in the list of values, but they cannot enter the additional attributes.

Note 2: Some elements of the user interface in the setup windows refer to the Oracle Citizen Interaction Center or CIC rather than to Oracle TeleService. This is because the additional attribute functionality was developed by the Oracle Citizen Interaction Center which has become an integrated part of Oracle TeleService in this release. Not all of the terminology has been changed in setup windows.

1.14.2 Overview of Attribute Setup

This overview summarizes setups for the capture of additional attributes. Follow the references in each step for detailed procedures.

To set up the capture of additional service request attributes:

1. Set up the prompts or questions agents will see and lists of values they will use to select the answers:
 - a. Enter the prompts or questions in the REQUEST_RESOLUTION_CODE lookup. For example: "Is the vehicle blocking traffic?" or "License Plate Number." See Creating Prompts and Questions on page 1-51.
 - b. Agents can either enter an attribute by typing it in or by making a selection from a list of values.

If you wish to have agents make their entries using the list of values, then create a new lookup for each list of answers. See Creating Lists of Values for the Answers on page 1-52.

A list of values ensures consistency of entries and improves duplicate checking. Although the application can check for duplicates based on free-text answers, the matches must be exact, including capitalization and spacing.

2. Navigate to Extended Attribute Configuration > Service Request Type Attributes and specify which questions and answers you wish to use for each Service Request Type. See Setting Up Attributes for a Service Request Type on page 1-53.
3. If you wish to have customers to fill in the same information when they create service requests using Oracle iSupport, then follow the steps described in Enabling Attribute Capture in Oracle iSupport on page 1-56.

1.14.3 Creating Prompts and Questions

Use this procedure to create the prompts or questions agents must answer for attribute capture.

To create the questions or prompts for capturing attributes:

1. Under the Application Developer Responsibility, navigate to Lookups > Application Object Library.

The Application Object Library Lookups window appears.

2. In the Type field, use the Query Enter / Query Run method to display the lookup CUG_SR_TYPE_ATTRIBUTES.
3. Set up each question or prompt on a separate row (you can create additional rows by clicking **New** in the toolbar):
 - a. In the Code field, enter a unique code. This code is for internal use only and does not get displayed to agents or users.
 - b. Enter the text of the question or prompt in both the Meaning field and Description field.

The wording you enter in the Description field is what agents see.

The Meaning field is displayed in the list of values you use to link the answers to the questions. For this reason you may wish to make the entries identical.
4. Click **Save** in the toolbar.

1.14.4 Creating the Lists of Values for the Answers

Use this procedure to create lookups with the lists of answers for questions you have defined.

To define the list of answers:

1. Under the Application Developer Responsibility, navigate to Lookups > Application Object Library.

The Application Object Library Lookups window appears.
2. In the Type field, enter a name for the list of answers. This is the name that will appear in the list of values when you link the list to the prompt or question.
3. In the User Name field, enter a user-friendly name for the value list.
4. Use the Application field LOV to select **Oracle Citizen Interaction Center**.
5. Optionally enter a description for this group of answers.
6. Set up the list of values in the table below the control region. You can create additional rows by clicking **New** in the toolbar as needed. For each value:
 - a. In the Code field, enter a unique code. This code is for internal use only and does not get displayed to agents or users.
 - b. Enter the wording in the Meaning and in the Description fields.

The wording you enter in the Description field is what agents see in the list of values.

7. Click **Save** in the toolbar.

1.14.5 Setting Up Attributes for a Service Request Type

Use this procedure to specify which attributes are to be captured for a Service Request Type.

Prerequisites

Service Request Types must be defined and you must have completed the setup of both the prompts and of the lists of values agents will use to make their entries.

To specify which attributes to capture for a Service Request Type:

1. Navigate to Extended Attribute Configuration > Service Request Type Attributes.

The Service Request Attribute Configuration window appears.

Name	List Name	Default Value	Sequence	Duplicate Check		Effective Dates	
				Mandatory	Displayed	Start	End
Is vehicle blocking traffic?	YES_NO_UNSURE		1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
What color is the vehicle?	CUG_COLOR		3	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
What make is the vehicle?	CUG_MAKE		2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
What model is the vehicle?	CUG_MODEL		4	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
What is the License Number?			5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Hazardous material?	YES_NO_UNSURE		6	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

2. Use the Type LOV to select the Service Request Type you wish to set up. The description of the Service Request Type appears in the Description field.

3. If you wish to validate the address by a user hook you have created, then select the Validate Address check box. The user hook can be read by a third party application that may have specific address format requirements. See Implementing the Validate Address User Hook on page 1-55.
4. Select the Address Mandatory check box if you wish to require agents to enter the incident address.
5. In the Service Request Attributes region, set up each attribute:
 - a. In the name field, select the prompt or question you defined in the CUG_SR_TYPE_ATTRIBUTES lookup type.

Note: The agents see the text displayed in the Attribute Description, not the name.

- b. If agents must use the list of values for their entries, then use the List Name LOV to select the lookup where you defined the valid values.

If you do not select a lookup here, agents will be permitted to make entries as free text.
 - c. If you have not selected a lookup in the previous step, then, optionally, enter a default value for this field. The default value is prefilled automatically in the attribute capture window and is saved if agents do not modify it.
 - d. Enter an integer in the Sequence field corresponding to the order you wish to present the prompt. The prompts are displayed in descending order.

Entry in this field is optional. If you do not enter a sequence, the application displays the prompts in alphabetical order.

If you specify an order, then the application displays those prompts with sequence first followed by any without a sequence in alphabetical order.
 - e. If you wish to make entry optional, then deselect the Mandatory check box. This check box is selected by default requiring agents to enter a value before saving the service request.
 - f. The Displayed check box must be selected to display the attribute to agents. This check box is selected by default.
6. Save your work.

7. If you wish to set up duplicate checking based on the attributes you have defined, then follow the instruction described in Setting Up Automatic Duplicate Checking for Service Requests on page 1-58.
8. If you wish to have customers fill in the same attribute information when they create service requests using Oracle iSupport, then follow the steps described in Enabling Attribute Capture in Oracle iSupport on page 1-56.

1.14.5.1 Implementing the Validate Address User Hook

You must use a Global Information System application such as Oracle Spatial, for the storage, retrieval, and manipulation of spatial data. Oracle TeleService provides the user hook for the address validation against this data.

The following provides guidelines to implement the validate address user hook:

To implement the validate user address hook for Runtime Form

Upon commit, CUG_VALIDATE_ADDRESS_TYPE.Validate_Incident_Address_Type (CUGVADTS.pls and CUGVADTB.pls) is called to validate address and jurisdiction; which then calls CUG_Validate_Address_Pkg.Validate_Incident_Address (CUGVADIS.pls) for address validation, and CUG_Validate_Type_Pkg.Validate_Incident_Type (CUGVTPIS.pls) for jurisdiction validation.

- You can customize or create the package body to implement address and jurisdiction validation logic in CUG_Validate_Address_Pkg.Validate_Incident_Address and CUG_Validate_Type_Pkg.Validate_Incident_Type package.

Note: The previously mentioned pls files can be found at \$CUG_TOP/patch/115/sql.

To implement the validate user address hook for Oracle iSupport

Citizen Interaction Center (CIC) has CugValidateAddressIF.java, CugValidateTypeIF.java, interface located under oracle.apps.cug.cm. This interface is the container of abstract methods that might be required to conduct address validation and jurisdiction check on a given incident address and incident type.

- You must set the following profiles to determine the customer implementation class for performing jurisdiction and address validation:
 - CUG_ADDRESS_VALIDATION_CLASS
 - CUG_TYPE_VALIDATION_CLASS

Note: CugValidateTypeAndAddress is a public java class which instantiates the interface implementation classes entered in the CUG_ADDRESS_VALIDATION_CLASS and CUG_TYPE_VALIDATION_CLASS profiles.

The architecture (PL/SQL and java) is executed only if the Validate Address flag is selected for the service request type in the Service Request Attribute Configuration window of the CIC setup.

See Setting Up Attributes for a Service Request Type on page 1-53.

1.14.6 Enabling Attribute Capture in Oracle iSupport

Use this procedure to make service request attribute capture available for use in Oracle iSupport. The procedure involves running two concurrent programs to map the attribute setup to iSupport templates. By doing so, customers entering service requests are asked to submit the same information as agents in Oracle TeleService.

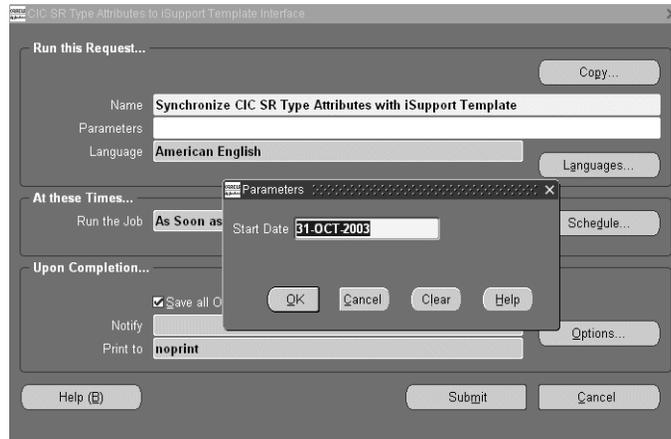
Prerequisites

- Be familiar with running concurrent programs.
- Set up attribute capture for Service Request Types first.

To enable attribute capture in Oracle iSupport:

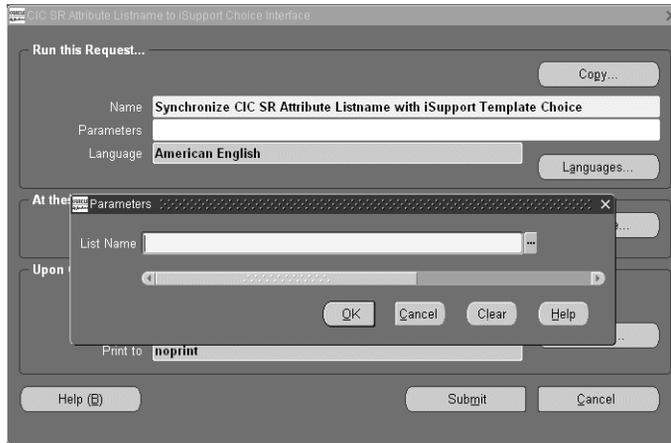
1. Navigate to Sync SR Type to iSupport Template.

The Parameters and the CIC SR Type Attributes to iSupport Template Interface windows appear.



2. Enter the start date. All attribute setups created on or since this date will be mapped to Oracle iSupport templates.
3. Click **Submit** and follow the standard procedures for running concurrent programs.
4. You must run a separate concurrent program to map each of the lookups (lists of values) that are used by your attribute setups. For each lookup:
 - a. Navigate to Sync SR Attribute Listname to iSupport.

The Parameters and the CIC SR Attribute Listname to iSupport Choice Interface windows appear.



- b. Enter the name of the lookup in the List Name field.
- c. Click OK.
- d. Submit the concurrent program following the standard procedure for running concurrent programs.

1.15 Setting Up Automatic Duplicate Checking for Service Requests

This group of topics explains how you can set up the application to automatically check for potential duplicates of the service request an agent or customer is creating.

For an explanation of the different ways of checking for duplicates, see Duplicate Checking Overview on page 1-59.

For the general setup procedure see Setting Up Duplicate Checking on page 1-61.

The remaining topics provide the details for the setup of each method:

- Setting Up Duplicate Checking by Customer and Item Details on page 1-62.
- Setting Up Duplicate Checking by Service Request Attributes on page 1-63.
- Setting Up Duplicate Checking by Item Instance or Serial Number on page 1-64.

1.15.1 Duplicate Checking Overview

The application flags existing service requests as potential duplicates if they are similar and were created within the time frame you specify. The application determines if the service requests are similar based on one or both of the following two types of information:

- The customer and item
- Incident address and the information captured through service request attributes

The two methods of checking for duplicates meet different business needs. If your organization services items owned by your customers, then you are likely to restrict the checking to the customer and item combination. If you are a government agency responding to reports of power outages or broken water mains, then you are likely to implement duplicate checking on the extended attributes and the incident address.

1.15.1.1 Duplicate Checking Based on Customer and Item

Suppose, for example, that an agent at a printer manufacturer receives a call from a customer contact reporting that a departmental printer is broken. The agent records the details about the problem and asks the caller for the printer's serial number.

If the agent enters the serial number or instance number for the printer, the application performs the duplication check immediately and displays a list of any service requests that have been created for that printer within the period you specify.

Because the printer is shared by many people in the department, chances are that others have already called in about the same problem. If they have, the agent can abort the service request creation, or, if the problem is new, continue creating the service request. (See *Setting Up Duplicate Checking by Item Instance or Serial Number* on page 1-64)

If the caller does not know the serial or instance number, the application checks for duplicates based on a combination of the customer and item and displays a listing of potential duplicates at the time the agent saves the service request. The agent can either create a new service request, or create a service request that is linked to the original service request as a duplicate.

Creating a service request as a duplicate for customers calling about the same problem makes it possible for the organization to better track the number of service

requests agents handle and to add the customer contact to the list of people who are notified when the issue is resolved.

Customers going online to report the same problem on their Oracle iSupport portal, do not receive any warnings. The application permits the customer to create the service request and, if it finds duplicates, notifies the owner of the service request (an agent that has been assigned to handle the service request) that the customer has created a potential duplicate.

Note: Only agents creating service requests in either the Service Request tab of the Contact Center or the Service Request window receive immediate notification of potential duplicates through pop-up windows. Duplication checking for agents creating service requests in Oracle eMail Center is limited to e-mail or workflow notification only.

1.15.1.2 Duplicate Checking Based on Capture of Extended Attributes

A government agency receives a call from a resident of 915 Oxford Street that a truck has been parked in front of the house for the past week.

The agent selects “Abandoned Vehicle” as the Service Request Type and enters the address the caller is reporting as the incident address. The application presents the agent with a list of questions that you have set up for this Service Request Type: What is the make of the vehicle?, the model?, the color?, the license plate number? (See Capturing Additional Service Request Attributes on page 1-49.)

When the agent saves the service request, the application performs the duplicate check based on any of the information you specify using the procedures in this section and displays a list of any potential duplicates.

Just as with the previous duplicate check method, the agent can create a new service request, or create a service request that is linked to the original service request as a duplicate.

If the customer goes online to report the problem, the application permits the creation of the service request and notifies an agent you specify in the setup that a potential duplicate service request has been created.

Note: The application notifies different individuals depending on which duplicate checking process you specify. For customer and item-based checking, the process notifies whoever is designated as the service request owner. For attribute-based checking you specify a single individual to be notified for each Service Request Type.

1.15.2 Setting Up Duplicate Checking

Use this procedure to set up duplicate checking upon saving a service request.

To set up duplicate checking:

1. Turn on duplicate checking by setting the system profile option Services: Check for Duplicate Service Requests to **Yes**.

By default this profile option is set to **No**. This profile option takes precedence over all other duplicate checking setups. If it is set to No, duplicate checking is turned off.

2. Select the type of duplicate check you wish to use by setting the profile option Services: Service Request Duplicate Criteria as follows:
 - a. If you wish to enable duplicate checking by customer and item alone, then select one of the following:

* **Instance or (Customer, Item, and Serial Number)**

Select this setting if your organization uses serial numbers when logging service requests against items.

The application checks duplicates on either the instance or the combination of customer, item, and serial number.

* **Instance or (Customer and Item)**

Select this option if you do not use serial numbers for logging service requests against items. The application checks for duplicates on either instance or a combination of customer and item.

Note: This profile takes precedence over setups you make in the Service Request Attribute Configuration window. If you select to check for duplicates using item and customer alone using one of these two settings, the application does not perform a check based on attributes even if you select to do so while setting up attributes in the Service Request Attribute Configuration window.

- b. If you wish to enable duplicate checking based on extended attributes and the incident address alone, then select **Extended Attributes and Incident Address**.
- c. If you wish to enable duplicate checking using both types of check, then select one of the two following options:
 - * **All with Serial Number**
Performs both type of duplicate checks with the serial number.
 - * **All without Serial Number**
Performs both type of duplicate checks without the serial number.
3. If you have selected to use duplicate checking by customer and item, then set up the time duration system profile and notifications as outlined in Setting Up Duplicate Checking by Customer and Item Details on page 1-62.
4. If you have selected to use the attribute method of duplicate checking, then select the attributes and time frame for the check in the Service Request Attribute Configuration window. See Setting Up Duplicate Checking by Service Request Attributes on page 1-63.

1.15.2.1 Setting Up Duplicate Checking by Customer and Item Details

In addition to procedure outlined in Setting Up Duplicate Checking on page 1-61, use this procedure to enable duplicate checking by customer and item.

Prerequisites

You must first set up the system profile options to enable duplicate checking by customer and item described in Setting Up Duplicate Checking on page 1-61.

To set up duplicate checking by customer and item:

1. Set up the time frame for the duplicate checking:

- a. Set the system profile option Service: Service Request Duplicate Time Frame UOM to the unit of time you wish to use. This profile option is set to Day by default.
 - b. Set the system profile option Service: Service Request Duplicate Time Frame to the time duration. This profile option is set to 30 by default.
2. If you wish the owner of the service request to be notified when the application finds duplicates, then set up notifications as described in Setting Up Notifications on page 1-79.

Notifications provide the only way to alert agents when service requests are created in Oracle iSupport or Oracle eMail Center. In the Service Request tab of the Contact Center and in the Service Request window, agents receive automatic alerts via pop-up windows.

1.15.2.2 Setting Up Duplicate Checking by Service Request Attributes

In addition to procedure outlined in Setting Up Duplicate Checking on page 1-61, use this procedure to set up duplicate checking by service request attributes.

Prerequisites

You must first:

- Set up service request attributes according to procedures described in Capturing Additional Service Request Attributes on page 1-49.
- Complete setting the system profile options to enable duplicate checking by attribute described in Setting Up Duplicate Checking on page 1-61.

To set up duplicate checking by service request attributes:

1. Navigate to Extended Attribute Configuration > Service Request Type Attributes.

The Service Request Attribute Configuration window appears.

Name	List Name	Default Value	Sequence	Duplicate Check Mandatory	Duplicate Check Displayed	Effective Dates Start	Effective Dates End
Is vehicle blocking traffic?	YES_NO_UNSURE		1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
What color is the vehicle?	CUG_COLOR		3	<input type="checkbox"/>	<input type="checkbox"/>		
What make is the vehicle?	CUG_MAKE		2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
What model is the vehicle?	CUG_MODEL		4	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
What is the License Number?			5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Hazardous material?	YES_NO_UNSURE		6	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

2. Select the Service Request Type you wish to set up using the Type list of values. The window displays the attributes you have created.
3. In the Duplicate Check region:
 - a. Select the Check Required check box.
 - b. Enter the time frame as an integer in the Time Frame field.
 - c. Select the unit of measure using the Increment Type list of values.

For example, if you wish the duplicate check to check all service requests created in the past two hours, then you enter 2 in the Time Frame field and select Hour as the increment.
4. Select the Incident Address check box, if you wish to use the incident address in duplicate checking.
5. For each attribute you wish to use for the duplicate check, select the Duplicate check box.

1.15.3 Setting Up Duplicate Checking by Item Instance or Serial Number

You can also check for potential duplicate service requests based on an item instance or a serial number.

Upon entering either an item instance or a serial number you will see a pop up window listing potential duplicate service requests that were created with a defined time frame.

Note: This check occurs when you select the item instance or serial number and not when you save the service request.

To set up duplicate checking by item instance or serial number

1. Set up the time frame for the duplicate checking:
 - a. Set the system profile option Service: Service Request Duplicate Time Frame UOM to the unit of time you wish to use. This profile option is set to Day by default.
 - b. Set the system profile option Service: Service Request Duplicate Time Frame to the time duration. This profile option is set to 30 by default.
2. Set the system profile Services: Check for Similar Service Requests to Yes. (A setting of No disables this functionality).

1.16 Setting Up Message Action Codes

If your organization is using Oracle Workflow-based messaging feature of service requests, you can use message action codes to specify an action you want a message recipient to take.

Agents can send messages regarding a service request from the Service Request window by selecting Select Messages from the Tools menu.

To setup a message action code:

1. Navigate to the Setup > Service Requests > Action Requests.

The Oracle Service: Service Request Action Request Type Lookups window appears. The type field and description display MESSAGE_ACTION_REQUEST and action request types used when sending messages.

Code	Meaning	Description	Tag	From	To	Enabled
BREAK	On Break	Agent On Break		31-AUG-2000		<input checked="" type="checkbox"/>
CALL	Call Back Customer	Call Back Customer		31-AUG-2000		<input checked="" type="checkbox"/>
HELP	Need help	Agent Needs Help		31-AUG-2000		<input checked="" type="checkbox"/>
SQQAAR	SRQA Action Request	QA Testing		23-JAN-2003		<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

2. Enter a message action code in the Code field.
3. Enter a brief description of the code in the Meaning field.
4. Enter a full description of the code in the Description field.
5. Enter the effective dates in the From and To fields.
6. Select the Enabled check box to make the code available for use.
7. Save the message action request code.

1.17 Setting Up Task Types and Priorities for Service Request Usage

This step is required to use task types and task priorities in the Service Request window's Task tab.

To set up task types and priorities:

1. Navigate to the Task Type Setup window.
Setup > Task Management > Task Types
2. All existing task types are displayed. For each task types which you want displayed in the Service request task tab, Click **Map Types**.
3. Associate the source Service Request to the task type.
4. Save your work.
5. Navigate to the Task Priority Setup window.
Setup > Task Management > Task Priority
6. All existing task priorities are displayed. For each task priority which you want to display in the Service Request Task tab, click **Map Priority**.
7. Associate the source Service Request to the task priority.
8. Save your work.

1.18 Setting Up the Display of Oracle Install Base Items

This step is required to display Oracle Install Base items in the Service Request window.

To set up the display of Oracle Install Base items:

1. Navigate to the Customer Product Statuses setup window.
Setup > Installed Base > Instance Status
2. Check the Request Allowed check box for the customer product statuses that you want to be displayed in the Service Request window.

1.19 Setting Up HTML Applications for Service Requests

This step is required to enable HTML applications from the Service Request. HTML applications include Oracle Knowledge Management and Oracle Install Base.

To enable Oracle Knowledge Management:

1. Login as SYSADMIN to the JTF URL for the relevant environment.
2. Open the Users tab.
3. Click on "Users" on the "User Management" menu list.
4. Search for the required user, for example, "SUPPORT"
5. Click on the User Name, "SUPPORT" on the search result to view the user details.
6. Click **Roles** to display the Available and Assigned roles for the user.
7. Assign the role "CS_SYSTEM_ADMIN" to the user.
8. Click **Update**.

To enable Oracle Install Base:

1. Perform steps 1 through 6 as described for Oracle Knowledge Management above.
2. Assign the role "CS_NORMAL_USER" to the user.

1.20 Setting Up Service Request Profile Options

System profile settings determine several default values that appear for service requests, control functionality and assist in the management of unique business processes. Profiles can be set at User, Responsibility, Application, and Site levels.

Site-level profile settings apply to all users at an installation site. Application-level profile settings apply to all the users of the specified application and override those set at the site level. Responsibility-level profile settings apply to all users who use the Responsibility to sign on to the application and override those set at site and application level. User-level profile options apply to individual users identified by their application user names and override all other profile options.

For a detailed explanation of system profile options and the procedures for setting them up, please refer to *Oracle Applications System Administrator's Guide*.

To set up the service request profile options:

1. If you are using a Customer Support Responsibility, the navigation path to update Profile Options is Other > System Profile Values.

2. You can also update system profiles under the System Administrator responsibility by navigating to Profiles > System.
3. Search for a specific profile and set the profile value at site, application, Responsibility, or user levels. Most Support related profile options begin with the word Service, so you can query on `Service%` for these.

1.21 Indexing Note and Summary Text for Searches

You can run the Service Request Synchronize Index concurrent program to make it possible for agents to search for text in the summary and note fields using the Service Request find window. By running this concurrent program on a periodic basis you can retrieve results that include recently-created service requests.

This concurrent program is set up by the system administrator and can be run every 15 minutes or 30 minutes, for example.

To run the Service Request Synchronize Index concurrent program:

1. Using System Administrator Responsibility, navigate to:
Security > Responsibility > Request
2. Query on the called Group "Support Reports".
3. Add the Service Request Synchronize Index concurrent program to the list.
4. Save your work.

1.22 Creating Owners and Supervisors

Follow these steps to create Owners and Supervisors.

1. Log-in as Sysadmin.
2. Select Responsibility: Human Resources.
3. From the Enter and Maintain form, and create two new Employees.
4. Make one of the Employees the Supervisor of the other, from the same form.
This can be done using the Assignment button on the same form.
5. Switch Responsibility to System Administrator.
6. Create two new users from the form: Security >Users >Define.

7. Associate these users to the two new employees by using the LOV for the field People on the Define Users form.
8. Switch Responsibility to Customer Support, Vision Enterprises.
9. Go to Resource Management >Maintain Resources >Import Resources.
10. Import the two new employees just created as resources, and save the resources.
11. Verify, from the Owner LOV on the Service Request form, that the two new resources exist.

1.23 Setting Up Service Request Linking Through Relationships

Agents can link service requests to other service requests and to other E-Business Suite objects by creating a relationship on the Related Objects tab of the Service Request window. This topic explains this functionality and the permitted modifications. It covers:

- Overview on page 1-71
- Permitted Modifications on page 1-75
- Changing Relationship Wording or Removing a Relationship Type from Use on page 1-75
- Adding Reference Relationships to Objects Other Than Service Requests on page 1-76
- Turning Off Automatic Service Request Status Updates Rules on page 1-78

1.23.0.1 Overview

By creating a relationship link to another service request or to another object, such as a maintenance plan for a piece of equipment, agents can make information available with the click of a mouse.

Relationships indicate, for example, that one service request is a duplicate of the other, that one is the cause of another, or that it contains relevant information for the resolution of another. An individual service request can be linked to multiple other objects.

Some types of the relationships are merely informational. Others propagate the change of status in one service request to the other service requests linked to it. For example, if agents specify that service requests A and B are caused by service request C, then closing C closes A and B as well.

Note 1: Status propagation is available only for linked service requests, not to other E-Business Suite objects.

The breakdown of a major system can sometimes cause multiple customer contacts to report the same problem. The status propagation permits the service organization to deal with all the duplicate service requests all at the same time.

Users have six available relationship types for linking service requests to other service requests:

- Caused by
- Root cause of
- Duplicate of
- Original for
- Reference for
- Refers to

Only the last two relationship types can be used to link service requests to other objects you set up:

- Reference for
- Refers to

Because relationships between two objects are bidirectional, they come in pairs. If a user specifies a relationship in one direction, the application automatically specifies a relationship in the other direction:

- Caused by /Root cause of
- Duplicate of /Original for
- Reference for / Refers to

The following two relationship pairs also propagate status changes between the linked service requests:

- Caused by/Root cause of
- Duplicate of/Original for

The following table explains the three most frequently used relationship types. The Action column of this table indicates both the status changes and reciprocal links created automatically by the application.

Relationship	Action	Example
Caused by	<p>Linking service request A to service request B using a "Caused by" relationship indicates that A is caused by B.</p> <p>The application:</p> <ul style="list-style-type: none"> ■ Sets the status of A to "Waiting". ■ Creates the reciprocal link "Root Cause of" for B. <p>When B is set to the status of "Closed", then the status of A is automatically set to "Clear".</p> <p>If multiple service requests are "Caused by" B, then all are set to "Clear".</p>	<p><u>Problem:</u></p> <p>A customer contact calls to say his e-mail is not working. The support agent discovers that the system administrator has already logged a service request to track this problem. The contact's e-mail is not working because the e-mail server is down.</p> <p><u>Resolution:</u></p> <p>The agent creates a "Caused by" link between the contact's service request and the service request already logged for the e-mail server problem. The application automatically sets the status of the contact's service request to "Waiting".</p> <p>When the system administrator resolves the e-mail server failure and closes the server problem service request, then the application automatically updates the contact's service request status to "Clear".</p>
Duplicate of	<p>Linking service request A to service request B with the "Duplicate of" relationship indicates that A is a duplicate of B.</p> <p>The application automatically:</p> <ul style="list-style-type: none"> ■ Creates an "Original for" link from B to A. ■ Changes the status of A to "Closed" with the resolution code "Closed as Duplicate". 	<p>All call center agents have been notified of the e-mail outage. Subsequently, an employee logs a ticket to report the e-mail outage.</p> <p>The agent who is assigned to work on the service request identifies it as a duplicate and enters the "Duplicate of" link.</p> <p>The application automatically closes the employee's service request with the resolution code of "Closed as Duplicate" and a reference to the service request already logged for the e-mail outage.</p>

Relationship	Action	Example
Refers to	<p>If service request A “Refers to” service request or document B, this means that B has information relevant to A.</p> <p>The application automatically creates the reciprocal “Reference for” relationship from B to A provided both documents are service requests.</p> <p>Agents can use this type of relationship for linking a service request to another object, such as a maintenance plan. See Adding Reference Links to Objects Other Than Service Requests on page 1-76 for more details.</p>	<p>An agent working on a service request remembers that he created a similar service request for another customer. By creating a link to that old service request, he makes it possible for others to refer to it.</p>

Note 1: Agents are permitted to indicate service request A is a duplicate of service request B only if service request A has no existing relationship links of type Duplicate of, Original for, Root Cause of, and Caused by. The service request can have existing relationship links of type Reference for and Refers to. If A does contain links, and agents wish to indicate A is a duplicate of B, they must first remove the links from A.

Agents are restricted in this way for logical reasons:

- A service request can be a duplicate of only one original.
 - Service requests that are originals for others cannot be chained.
 - Service requests that are the cause of or caused by others will cause logical errors in the status propagation.
-

Note 2: If you are implementing status transitions as described in Status Groups and Status Transitions on page 1-3, then you must make sure that you permit the status transitions required by the automatic service request status update rules. The rules must allow the application to be able to update the status of duplicate service requests to “Closed”, for example.

Note 3: The application automatically sends an Oracle Workflow notification to the service request owner if the automatic status update fails. If you wish, you can modify the text of the Oracle Workflow message “Notify: Service Request Update Failed Message. The item type for this message is Service Request (Internal Name: SERVEREQ).

1.23.1 Permitted Modifications to Service Request Relationships

While you are not permitted to add new relationship types, you can:

- Change relationship wording or remove a relationship type from use. (See Changing the Wording of a Relationship Type or Removing It from Use on page 1-75.)
- Add reference type links to objects other than service requests. (See Setting Up Reference Links to Objects Other Than Service Requests on page 1-76.)
- Turn off automatic service request status update rules. (See Turning Off Automatic Service Request Status Updates Rules on page 1-78.)

1.23.2 Changing the Wording of a Relationship Type or Removing It from Use

Use this procedure to change the wording users see in the Relationship Type list of values or to remove a link type from use.

To change the wording for a relationship type or remove it from use:

1. From the Navigator, navigate to Setup > Service Requests > Relationships and Valid Objects.

The Define Relationships page appears in your browser window.

2. If you wish to modify the wording of a relationship agents see in the LOV, then make the modifications in the Relationship Name field.
3. If you wish to restrict the availability of a relationship, then enter a start date, an end date, or both. Entering a start date in the future postpones the use of that relationship type until that date. Entering an end date ends the availability of the relationship type at midnight of the date specified.

Note: Because the relationships are reciprocal and come in pairs, restricting the availability of one relationship type automatically restricts the availability of its reciprocal.

4. Click **Apply** to save your work.
5. If you wish to permit users to link service requests to objects other than service requests using the “Reference for” and “Refers to” link pair, then click **Update Valid Objects** (the pencil icon) in the Reference for row and follow the procedure outlined in Adding Reference Links to Objects Other Than Service Requests on page 1-76.

1.23.3 Setting Up Reference Links to Objects Other Than Service Requests

Use this procedure to make it possible for users to link service requests to objects using the “Refers to” relationship link. The system automatically creates the reciprocal “Reference for” relationship. By default, this relationship type is already set up for service requests.

Prerequisites

You must set up the objects you wish to link to service requests using the Task Setup: Object Types window which is available by navigating to Task and Escalation Manager > Setup > Objects Meta-data under the CRM Administrator Responsibility.

See Setting Up Metadata Objects in *Oracle Common Application Components Implementation Guide* for details.

To set up reference links to objects other than service requests:

1. From the Navigator, navigate to Setup > Service Requests > Relationships and Valid Objects.

The Define Relationships page appears in a browser window.

ORACLE Diagnostics Preferences Help Close Window

Define Relationships

[Revert](#) [Apply](#)

The following table displays all service request relationships grouped by its reciprocal relationship.

TIP Relationships are created when a service agent is diagnosing a service request.

Name	Description	Start Date	End Date	Update Valid Objects
Root Cause of	This issue resulted in other issues. When this issue is closed, all issues that it caused can be automatically closed.	05-Feb-2002	08-Feb-2030	
Caused by	This issue was caused by other issues. This issue can be automatically closed when the other issues have been closed.	05-Feb-2002	08-Feb-2030	
Duplicate of	This issue is identical to another issue. Duplicate issues are immediately closed and contain a reference to the original issue.	08-Feb-2002		
Original for	This issue is identical to another issue. Original issues are tracked and resolved.	08-Feb-2002		
Reference for	This issue contains information which is referenced by other objects.	09-Jan-2002		
Refers to	This issue refers to another issue for more details.	09-Jan-2002		

TIP If you update a relationship's start or end date, the system will synchronize the dates with its reciprocal.

[Revert](#) [Apply](#)

- Click **Update Valid Objects** (the pencil icon) in the "Reference for" row. The Valid Objects page appears.

ORACLE Diagnostics Preferences Help Close

Define Relationships > Update Valid Objects

Valid Objects: Reference for Relationships

TIP If the Related Object Type you want does not exist you can go to JTF Objects to create one.

[Revert](#)

Previous Next

Object Type	Relationship	Related Object Type	Start Date	End Date
Defect	Reference for	Service Request		
Enhancement	Reference for	Service Request		
Service Request	Reference for	Defect		
Service Request	Reference for	Enhancement		
Service Request	Reference for	Service Request		
Unit Maintenance Plan	Reference for	Service Request		
Unit Maintenance Plan	Reference for	Service Request		
Service Request	Reference for	RMA		
Service Request	Reference for	Collateral Request		
Service Request	Reference for	Item		

[Add Another Row](#)

Previous Next

TIP If you create a new valid object, the system will automatically create a valid object for the reciprocal relationships.

TIP If you update a valid object's start or end date, the system will synchronize the dates with its reciprocal.

- Click **Add Another Row**.

4. From Relationship Type drop-down list, select **Refers to**.
5. Click **Search for Related Object Type** (the searchlight icon in the Related Object Type column.)
Search and Select: Related Object Type page appears.
6. Click **Go** to display all of the objects you have defined.
7. Select the radio button next to the name of the object.
8. Click **Select**.
The object you selected appears in the Valid Objects: Reference for and Refers to Relationships page.
9. Click **Apply** to save your work.

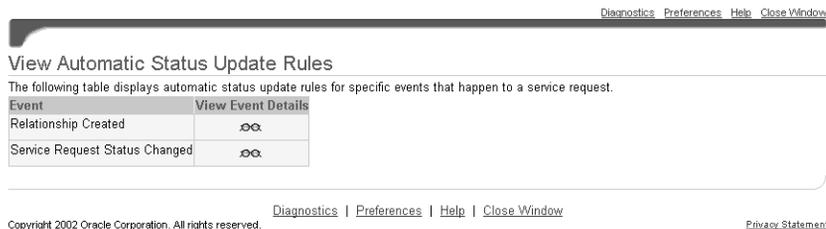
1.23.4 Turning Off Automatic Service Request Status Updates Rules

Use this procedure to turn off any of the seeded automatic service request status update rules. You cannot add rules or modify them.

To turn off automatic service request status update rules:

1. From the Navigator, navigate to Setup > Service Requests > View Status Update Rules.

The View Automatic Status Update Rules page appears in a browser window.



2. Click **View Event Details** (the glasses icon) to the right of the rule type you wish to disable.

The View Event Details page appears. The page displays different details depending on the rule type you have chosen.

[Diagnostics](#) | [Preferences](#) | [Help](#) | [Close Window](#)

[View Automatic Status Update Rules](#) > View Event Details: Relationship Created

View Event Details: Relationship Created

In the table below, Relationship, To/From, and Status columns are conditions. If the condition is met, the system will automatically perform the action defined in the next 4 columns of the table. [Revert](#) [Apply](#)

Relationship	To/From	Status	Action	Relationship	Status	Resolution Code	Start Date	End Date
Duplicate of			Change Resolution Field			Closed as duplicate	23-Feb-2003	
Caused by			Change SR Status		Waiting		23-Feb-2003	
Duplicate of			Change SR Status		Closed		23-Feb-2003	

[Revert](#) [Apply](#)

[Diagnostics](#) | [Preferences](#) | [Help](#) | [Close Window](#)

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3. Enter an end date for any rule you wish to disable.
4. Click **Apply**.

1.24 Setting Up Notifications

This group of topics explain how to set up rules to trigger automatic notifications to agents and customers of different service-request-related events. These include:

- Overview of Notifications on page 1-79
- Notification Post-Install Steps on page 1-81
- Restrictions for the Notification Process on page 1-82
- Modifying the Notification Mode on page 1-82
- Modifying and Creating Notification Message Templates on page 1-82
- Displaying Existing Notification Rules on page 1-85
- Creating a New Notification Rule on page 1-86
- Updating Existing Notification Rules on page 1-88

1.24.1 Overview of Notifications

You can set up the application to automatically notify the service request owner and customer contacts associated with the service request whenever a certain event occurs, for example, whenever a service request is created, closed, or reassigned. Notifications can be sent via Oracle Workflow notifications or by e-mail.

Oracle TeleService includes a notification workflow and notification templates suitable for different types of events, but implementers must set up the rules that trigger the workflow.

The rules make it possible to selectively notify users only about events of interest to the organization. This notification functionality enhances and replaces notifications through the Call Support Process workflow which can be associated with Service Request Types. The Call Support Process notifies users each and every time a service request is updated.

This release includes one seeded notification rule: If service request status changes to closed, then notify the primary contacts of related service requests.

The following table describes the events that can trigger a notification message to be sent and the scope of the rule you can create.

Event	Description	Who you can Notify	Explanation
Contact Added to Service Request	An agent or customer adds a contact to a service request. A contact can be either a customer contact or an employee.	<ul style="list-style-type: none"> ■ All contacts associated with the service request ■ The new contact ■ The service request owner ■ The primary contact 	The application sends out notifications when an agent or a customer adds a contact to the service request.
Published Solution Added to Service Request	An agent or a customer has linked a published knowledge management solution to the service request.	<ul style="list-style-type: none"> ■ All contacts ■ Only the primary contact 	The application sends out notifications whenever an agent or customer links a knowledge management solution to a service request. You may wish to use this message to e-mail suggested fixes to customer problems.
Service Request Status Changed	An agent or a customer changes the service request status.	<ul style="list-style-type: none"> ■ All contacts ■ The service request owner ■ Owners of all related service requests. ■ Notify the primary contacts of all related service requests 	The application sends out notifications whenever a service request is changed from one status to another. You must specify the status transition that triggers the notification. For example, if you wish to notify all contacts whenever a service request is closed, then you could trigger a message whenever the status changes from "Working" to "Closed".

Event	Description	Who you can Notify	Explanation
Service Request Created	An agent creates a service request.	<ul style="list-style-type: none"> ■ All contacts ■ Only the primary contact 	The application sends out a notification whenever an agent creates a service request.
Service Request Owner Changed	An agent or concurrent program has assigned a new owner or removed an old owner.	<ul style="list-style-type: none"> ■ Old owner of the service request ■ New owner of the service request 	You can notify new owner that a service request has been assigned to them and that the old owner is no longer assigned.
Relationship Created	An agent creates a relationship between a service request and other related service requests, maintenance plans, or other E-Business Suite objects.	<ul style="list-style-type: none"> ■ Service request owner 	<p>Agents can specify different relationships between a service request and other service requests or E-Business Suite objects. For example, they can specify service request A is a duplicate of service request B or caused by the problem described in the service request B.</p> <p>You can specify which relationship will trigger a notification to be sent to the service request owner. See <i>Setting up Service Request Relationships</i> on page 1-71 for more details.</p>
Relationship Removed	An agent removes a relationship in a service request.	<ul style="list-style-type: none"> ■ Service request owner 	You can notify the owner of the service request if another agent has removed a previously established relationship between the service request and another service request or object. You must specify the relationship you wish to trigger the notification.
Service Request Updated	An agent or customer updates the service request.	<ul style="list-style-type: none"> ■ Service request owner 	You can notify the owner whenever someone else updates the service request.

1.24.2 Notification Post-Install Steps

This procedure explains how to remove unnecessary lines in the body of e-mail notification messages.

By default all e-mail notification templates contain the following two unnecessary lines in the body of the message:

- Oracle Workflow Notification (FYI)
- From

To remove unnecessary e-mail notification lines:

1. Open the "System: Mailer" item type
2. Open the "Workflow Open FYI Mail" (internal name:OPEN_MAIL_FYI) message
3. Select the Body tab.
4. Delete the first two lines and save the message.

1.24.3 Restrictions for the Notification Process

The following restrictions apply:

- You can only notify individual service request owners (not group owners).
- Service request owners are not notified if they themselves have taken the action that triggered the notification. For example, a service request owner who is being notified every time a service request is being updated receives notifications only when others update the service request.
- For e-mail notifications, the customer contact record must contain an e-mail address for the notifications to be sent.

1.24.4 Modifying the Notification Mode

You can send notifications via e-mail or Oracle Workflow notifications.

By default:

- Service request owners receive notifications via Oracle Workflow.
- All service request contacts, employee and customer, receive notifications by e-mail.

To change the notification modes, you can modify the Notification Mailer setup in Oracle Workflow as described in the *Oracle Workflow Guide*.

1.24.5 Modifying and Creating Notification Message Templates

The subject and text of the message users receive is stored in a Oracle Workflow message template. You can create your own notification message templates or you

can modify those provided with Oracle TeleService by following the procedures in the Setting Up Oracle Workflow section of the *Oracle Workflow Guide*.

This table lists the templates provided with Oracle TeleService:

Message Name	Description
Notify Contact: Service Request Created Message	Notifies a contact that they have been listed as a contact in a service request.
Notify Contact: Service Request Status Updated Message	Notifies recipient that a service request status has been updated.
Notify New Owner: Service Request Reassigned Message	Notifies an agent that they have been assigned as the new owner of a service request.
Notify Old Owner: Service Request Reassigned Message	Notifies an agent that ownership of the service request has been reassigned to someone else.
Notify Owner: Service Request Created Message	Notifies an agent that a service request was created with them as the owner.
Notify Owner: Service Request Status Updated Message	Notifies the recipient that the service request status was updated.
Notify Primary Contact: Service Request Created Message	Notifies the recipient that a service request has been created with them listed as a primary contact.
Notify: Published Solution Added to Service Request Message	Notifies recipient that a knowledge base solution has been added to the service request.
Notify: Related Service Request Created Message	Notifies recipient that an agent has created a relationship with another service request. For example, if an agent has indicated another service request is a duplicate of the service request.
Notify: Related Service Request Removed Message	Notifies recipient that a relationship between a service request and a second service request or object has been removed. For example, if an agent removes the link indicating a duplicate service request.
Notify: Related Service Request Updated Message	Notifies recipient that a linked service request has been updated.
Notify: Service Request Contact Added Message	Notifies recipient that a new contact has been added to the service request.
Notify: Service Request Updated Message	Notifies recipient that a service request has been updated.

Message Name	Description
Notify: Contacts of Related Service Requests	Notifies contacts of related service request that the status of the primary service request has been updated.

Here are the message requirements:

- All seeded messages are defined in the Oracle Workflow item type Service Request (Internal Name: SERVEREQ)
- The internal name for all new messages you create must start with: CS_SR_EVT
- The message definition can be up to 1376 characters in length.
- Although Oracle has seeded only text messages, you can set up HTML messages instead.
- You can automatically display service request details in your message by entering different tokens. Here is the list of available tokens:

Display Name	Internal Name
Created By	CREATED_BY
Customer Product ID	CUSTOMER_PRODUCT_ID
Expected Resolution Date	EXPECTED_RESOLUTION_DATE
Initiator Role	INITIATOR_ROLE
Inventory Item ID	INVENTORY_ITEM_ID
Old Request Status	REQUEST_STATUS_OLD
Owner ID	OWNER_ID
Owner Name	OWNER_NAME
Owner Role	OWNER_ROLE
Previous Owner ID	PREV_OWNER_ID
Previous Owner Name	PREV_OWNER_NAME
Previous Owner Role	PREV_OWNER_ROLE
Problem Code	PROBLEM_CODE
Problem Description	PROBLEM_DESCRIPTION
Product Description	PRODUCT_DESCRIPTION

Display Name	Internal Name
Request Customer	REQUEST_CUSTOMER
Request Date	REQUEST_DATE
Request ID	REQUEST_ID
Request Number	REQUEST_NUMBER
Request Severity	REQUEST_SEVERITY
Request Status	REQUEST_STATUS
Request Summary	REQUEST_SUMMARY
Request Type	REQUEST_TYPE
Request Urgency	REQUEST_URGENCY
Resp Appl ID	RESP_APPL_ID
Resp ID	RESP_ID
Response Deadline	RESPONSE_DEADLINE
Response Time	RESPONSE_TIME
Solution Summary	SOLUTION_SUMMARY
Updated By	UPDATED_BY
User ID	USER_ID
Workflow Administrator Role	WF_ADMINISTRATOR

The SERVEREQ item type includes additional tokens which are specific to internal application workflows.

1.24.6 Displaying Existing Notification Rules

Use this procedure to display existing notification rules.

To display existing notification rules:

1. Navigate to Setup > Service Request > View Notification Rules.

The View Notification Rules page appears listing any rules you have created previously.

ORACLE Diagnostics Preferences Help CI

Notification Rules Summary

The system will notify the owners and contacts of a service request when any of the following conditions are met. The system will not send a notification to the service request owner if he or she is the one who created or updated the service request. Revert

[Define Notification Rules](#)

Event	Condition	Action	Relationship	Template Name	Update
Service Request Owner Changed	Always	Notify New Owner		Notify New Owner: Service Request Reassigned Message	
Service Request Owner Changed	Always	Notify Old Owner		Notify Old Owner: Service Request Reassigned Message	
Service Request Created	Always	Notify Owner		Notify Owner: Service Request Created Message	
Service Request Status Changed	From Open	Notify Owner of Related Service Requests	Reference for	Notify Primary Contact: Service Request Created Message	
Service Request Status Changed	From Open	Notify Owner of Related Service Requests	Refers to	Notify: Related Service Request Updated Message	
Service Request Status Changed	From Open	Notify Owner		Notify: Service Request Updated Message	
Service Request Updated	Always	Notify Owner		Notify: Service Request Updated Message	
Published Solution added to Service Request	Always	Notify Primary Contact		Notify: Published Solution Added to Service Request Message	

[Revert](#)

You can:

- Delete a rule by clicking **Delete** (the trash can icon).
- Update a rule by clicking **Update** (the pencil icon). See Updating Existing Notification Rules on page 1-88.
- Create a new rule by clicking **Define Notification Rules**. See Creating a New Notification Rule on page 1-86.

1.24.7 Creating a New Notification Rule

Use this procedure to create a new notification rule.

To create a new notification rule:

1. Navigate to Setup > Service Request > Define Notification Rules.
2. Click **Define Notification Rules**.

The Define Notification Rule page appears.

ORACLE

[Notification Rules Summary](#) > Define Notification Rule

Define Notification Rule

Select the conditions when you want the owners and contacts of a service request to be notified.

Event

*Action	Update Action Details	Delete
No filter selected.		

[Diagnostics](#) | [Preferences](#) | [Help](#) | [Close Window](#)

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3. Select the event for the rule using the Event drop-down box.

4. Click **Go**.

The page displays any rules already created for this event.

5. Click **Add Row**.

6. In the new row, select the condition(s) you wish to use as the trigger the notification. The conditions are different for each type of event.

For example, if you wish to send out a notification each time a service request changes a status, then select:

- The status to trigger the notification.
- The condition

Whether you want to send the notification each time a service request changes to the target status or changes from that status.

- Whom you want to notify

You have three choices: you can notify all contacts on the service request, the service request owner, or all the owners of service requests that have been linked to the service request via a relationship.

7. Click **Update Action Details**.

The Notification Details page appears.

8. Click **Search for Notification Template** (the searchlight icon).

The Search and Select: Notification Template page appears.

9. If you wish to restrict your search, then enter a complete or partial name of a template in the Search by field.

10. Click **Go**.

The page displays the available templates in the Results region.

11. Select the radio button next to the template you wish to use.

12. Click **Select**.

The template name displays in the Notification Details page.

13. Click **Apply**.

14. If you wish to create or update another rule, then select the View Notifications Rule link at the top left of the page.

1.24.8 Updating Existing Notification Rules

Use this procedure to update existing notification rules. You can delete rules or update existing rule conditions and attach different notification message templates.

To update an existing notification rule:

1. Display the existing notification rules by navigating to Setup > Service Request > View Notification Rules.

The Define Notification Rule page appears.

2. Click **Update** (the pencil icon) for the rule you wish to update.

The Define Notification Rule page appears displaying the rules already associated with this event.

3. If you wish to delete a rule, then click **Delete** (the trash can icon).

4. If you wish to modify the conditions for this rule, then make your modifications.

The conditions are different for each type of event. For example, if you wish to modify a rule which sends out a notification each time a service request changes to the status of "Closed" then you can modify:

- The status you wish to trigger the notification.
- The condition: whether you want to send the notification each time a service request changes to the status or changes from that status.

- Who you want to notify. For status changes, you have three choices: you can notify all contacts on the service request, the service request owner, or all the owners of service requests that have been linked to the service request via a relationship.
5. If you wish to select a different notification message template for this rule, then click **Update Action Details**.
The Notification Details page appears.
 6. Click **Search for Notification Template** (the searchlight icon).
The Search and Select: Notification Template page appears.
 7. If you wish to restrict your search, then enter a complete or partial name of a template in the Search by field.
 8. Click **Go**.
The page displays the available templates in the Results region.
 9. Select the radio button next to the template you wish to use.
 10. Click **Select**.
The template name displays in the Notification Details page.
 11. Click **Apply**.
 12. If you wish to update another rule, then select the View Notifications Rule link at the top left of the page.

1.25 Implementing Oracle eMail Center and E-Mail Templates

Integration with Oracle eMail Center makes it possible for agents to communicate with customers via e-mails from both the Contact Center and the Service Request windows.

When Oracle eMail Center is implemented, agents can:

- Compose e-mails to customers and customer contacts by clicking on an icon. Agents can use e-mail templates which supply the contextual information about the customer.
- View the text of e-mails sent via Interaction History.

1.25.0.1 Guidelines for Setting Up the Oracle eMail Center

Follow these general steps when implementing the Oracle eMail Center:

1. Set up Oracle eMail Center as described in the *Oracle eMail Center Implementation Guide*.
2. Set up e-mail templates for use with the Contact Center and Service Request forms. You can use the mail-merge fields listed in Customer and Contact Mail Merge Fields on page 1-91 and Service Request Mail Merge Fields on page 1-93.
3. To enable e-mail from the Contact Center:
 - a. Set the following system profile options:
 - Customer Care: Enable Outbound E-mail From the Contact Center
This profile option sets enables the e-mail buttons on the application's tool bar. A setting of Yes, the default, enables the icons and permits users to use the icons to send e-mails. A setting of No disables the icons and functionality.
 - Customer Care: Default Template for Outbound from Contact Center
Set this profile to the e-mail template you wish agents to use as a default for creating e-mails. There is no seeded template available, so you must create your own.
 - Customer Care: Default Category for Outbound E-mail from Contact Center
If you wish to restrict the use of eMail Center templates by Oracle Marketing Encyclopedia System (MES) product categories, then set this profile to any of the existing categories.

- b. You can specify which responsibilities can create e-mails within the Contact Center by mapping the function CSCSFECW according to the procedures described in *Oracle Applications System Administrator's Guide*. This function controls access to the Open Email Compose Window icon in the Toolbar and the corresponding menu selection. The seeded Customer Support Responsibility includes this mapping.
4. To enable e-mail from the Service Request window, set the following system profile options:
- Service: Enable Defaulting CC field in Email Header While Sending An Email In Service Request Form

Setting this profile option to Yes automatically defaults in the CC address line the e-mail addresses of all the service request contacts. If an agent is sending an e-mail to the customer e-mail address, then all of the service request contacts are copied on the e-mail. If the agent is e-mailing one of the contacts all of the remaining contacts are copied. The application defaults the e-mail addresses only when agents launch the compose window from the Service Request window.

Setting this profile to No leaves the CC address line blank.
 - Service: Subject Prefix for Outbound Email in Service Request

Setting this profile to Yes causes the application to populate the Subject line of the e-mail with the problem summary from the service request. The application defaults the subject line only when agents launch the compose window from the Service Request window.

Setting this profile to No leaves the subject line blank.
 - Service: Default Email Template

Set this profile to a default e-mail template you have created.

1.25.0.2 Customer and Contact Mail Merge Fields

For setting up e-mail templates for use with the Contact Center, you can use the following customer, contact, and interaction parameters:

Customer Parameter	Description
CUSTOMER_NAME	Customer's name
CP_FIRST_NAME	Customer's first name

Customer Parameter	Description
CP_LAST_NAME	Customer's last name
CP_PARTY_NUMBER	Party Number
CP_PRIMARY_PHONE	Identifying phone number
CP_PRIMARY_EMAIL	Identifying email
CUST_URL	Identifying URL
CP_ADDRESS	Identifying address (the address displayed on Contact Center header)
CP_CITY	City for the identifying address
CP_STATE	State for the identifying address
CP_POSTAL_CODE	Postal Code for the identifying address
CP_COUNTRY	Country for the identifying address
ACCOUNT_NUMBER	Account number displayed on the header

Contact Parameter	Description
CONTACT_NAME	Party name
CON_FIRST_NAME	First name
CON_LAST_NAME	Last name
CON_PARTY_NUMBER	Party number
CON_PRIMARY_PHONE	Primary phone
CON_PRIMARY_EMAIL	Primary email
CONT_URL	Primary URL
CON_ADDRESS	Identifying Address displayed on the contact center header
CON_CITY	City
CON_STATE	State
CON_POSTAL_CODE	Postal Code
CON_COUNTRY	Country
RELATION	Relationship displayed on Contact Center header.

Contact Parameter	Description
CRITICAL_FLAG	Critical Customer Flag
TIMEZONE	Contacts Time Zone

Interaction Parameter	Description
INTERACTION_ID	Interaction Id
DEFAULT_OUTCOME_FOR_INTERACTION	Default outcome for an interaction
DEFAULT_RESULT_FOR_INTERACTION	Default result for an interaction
DEFAULT_REASON_FOR_INTERACTION	Default reason for an interaction
DEFAULT_OUTCOME_FOR_ACTIVITY	Default outcome for an activity
DEFAULT_RESULT_FOR_ACTIVITY	Default result for an activity
DEFAULT_REASON_FOR_ACTIVITY	Default reason for an activity

1.25.0.3 Service Request Mail Merge Fields

You can use the following service request mail merge fields in the templates for e-mails sent from the Service Request window:

Service Request Parameter	Description
SR_CUSTOMER_NAME	Customer name
SR_CONTACT_NAME	Contact name
SR_ACCOUNT_NUMBER	Account number
SR_NUMBER	Service request number
SR_STATUS	Service request status
SR_TYPE	Service Request Type
SR_SEVERITY	Service request severity

Service Request Parameter	Description
SR_URGENCY	Service request urgency
SR_REPORTED_DATE	Service request incident date
SR_GROUP_OWNER	Service request group owner
SR_INDIVIDUAL_OWNER	Service request individual owner
SR_ITEM	Item
SR_ITEM_DESC	Item Description
SR_INSTANCE	Instance
SR_SERIAL_NUMBER	Serial number
SR_REVISION	Revision
SR_TAG	Tag
SR_SYSTEM	System
SR_CONTRACT	Contract
SR_CONTRACT_LINE	Contract Line
SR_COMPONENT	Component
SR_COMPONENT_DESC	Component description
SR_COMPONENT_REV	Component revision
SR_SUBCOMPONENT	Subcomponent
SR_SUBCOMPONENT_DESC	Subcomponent description
SR_SUBCOMPONENT_REV	Subcomponent revision
SR_SUMMARY	Service request summary
SR_RESOLUTION_SUMMARY	Resolution summary
SR_RESOLUTION_BY	Service request resolution by date
SR_RESPOND_BY	Service request respond by date
SR_SUPPORT_SITE	Support site

Service Request Parameter	Description
SR_ESCALATION_LEVEL	Escalation level

1.26 Setting Up the List of Values for the Language Field

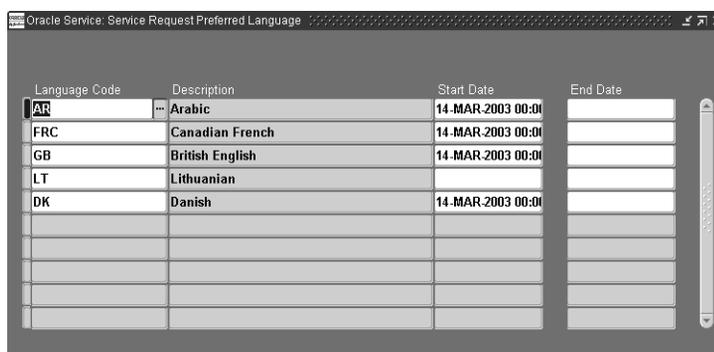
Use this procedure to set up the list of values for the Language field in the Service Request window header. Agents can use this field to indicate a customer's preferred language for a specific service request.

Note: The language preference agents enter using this LOV remain specific only to individual service requests. The preference is not stored in the customer record itself. This means that selecting a language preference in a service request does not modify the customer's overall language preference which is entered in the Preferred Language field in the Party Information tab of the Contact Center.

To set up the list of values for preferred languages:

1. Navigate to Setup > Service Requests > Preferred Language

The Oracle Service: Service Request Preferred Language window appears.



Language Code	Description	Start Date	End Date
AR	Arabic	14-MAR-2003 00:00	
FRC	Canadian French	14-MAR-2003 00:00	
GB	British English	14-MAR-2003 00:00	
LT	Lithuanian		
DK	Danish	14-MAR-2003 00:00	

2. Use the Language Code LOV to select the languages you wish to add to the list of values in the Language field.

The language name the agent will see in the LOV appears in the Description field.

3. Optionally, enter dates if you wish to limit the availability of your entry.
4. Click **Save**.

1.27 Setting Up Default Response and Resolution Times

Use this procedure to set up default service request response and resolution times by business process and service request severity.

When agents create a service request not covered by a contract, the application uses these times to calculate the deadlines for responding and resolving the service request and automatically defaults the Respond By and Resolve By fields.

The application calculates the deadlines based on the date and time displayed in the Reported field of the Service Request (INCIDENT_DATE).

If agents later change the Service Request Type or severity, the defaults change accordingly.

If an agent later selects a contract for the service request or enters an installed base item covered by a contract, these default times get overwritten by those specified in the contract.

To set up default response and resolution times:

1. Set up an Oracle Service Contract coverage template with the reaction times and resolution times for each business process and service request severity as described in the *Oracle Service Contracts User Guide*.

Note: The template you create is for defaulting reaction times and resolution times only. It cannot be used to default pricing information such as discounts and labor rates.

2. Navigate to Others > Profile System Values and set the system profile option Service: Default Coverage for SLA to the name of the template you have created.

1.28 Automating the Closure of Service Requests

These two topics explain how you can automate the closure of service requests and related tasks. The first explains closure. The second provides the procedure for setting it up.

- Understanding Closure Automation on page 1-97
- Setting Up Automatic Closure for Service Requests on page 1-99

1.28.1 Understanding Closure Automation

Service requests can have multiple associated tasks that have a completion status independent of the service request itself. If you do not implement closure automation, the closure of each task is independent of the closure of the service request. This means that agents must remember to close all tasks when they close a service request and remember to close the service request after all tasks are completed.

You can automate closure by one or both of the following methods:

- Downward Propagation
- Upward Propagation

1.28.1.1 Downward Propagation

If an agent wishes to close the service request, you can have the application check if the service request is ready to be closed and then automatically close all of the service request tasks.

The application prevents agents from closing the service request for any of the following reasons:

- If any tasks with the Restrict Closure check box selected are not closed
Agents can select this check box when they create a task to prevent closure of the service request when the task is not in a closed status.
- If the service request has associated non-field service tasks that are still being worked on

The application determines a task is still being worked if the task start date is equal or earlier than the system date and if there is no end date. The application checks both the scheduled and actual start date. This is because an engineer may start a task without having yet had the chance to record the actual start date.

This rule does not check Oracle Field Service tasks as this application has its own rules for preventing closure.

- If the service request has field service tasks that are scheduled or in progress
See Oracle Field Service documentation for details.
- If the service request includes charges that have not yet been successfully submitted

The application only checks charge lines of type Actual with the OM Interface check box selected.

The application does not check for open Oracle Enterprise Asset Management work orders, Oracle Depot Repair repair orders, and maintenance requirements. This means that the service request and associated tasks can be closed even with work orders or repair orders in progress.

You can enable downward propagation in this release by setting the system profile Service: Validate and Auto Close on Service Request Closure to Yes. The system profile Service: Task Auto Close Status determines the status of the closed tasks.

Oracle Complex Maintenance Repair, and Overhaul closes its own maintenance requirements.

The closure of associated tasks is immediate. As soon as the agent closes the request, all of the tasks are closed as well. If any of the rules are violated, the application warns the agent with an error message.

1.28.1.2 Upward Propagation

If all service request tasks have been closed or all charges have been submitted, you can have the application check if the service request is ready to be closed and then close it.

The application prevents the service request from being closed if:

- Not all tasks are closed

The application prevents the service request from being closed if any associated task is in a status that does not have the Closed check box selected.

- If any debriefed tasks have encountered errors when being converted to charges
- If there are any charges that have not been submitted to Oracle Order Management

- If there are any Oracle Depot Repair repair orders, Oracle Enterprise Asset Management work orders, or Oracle Complex Maintenance Repair, and Overhaul maintenance requirements.

Closure is prevented if any of these are associated with the service request, regardless of status.

You can turn upward propagation on by setting the system profile Service: Auto Closure of Service Request to Yes. You specify the status you wish to apply to the service request in Service: Service Request Auto Close Status.

The speed with which the service request is closed depends on your implementation of the Oracle Workflow Event Manager.

This module has seeded event subscriptions for the following two business events:

1. oracle.apps.jtf.cac.task.updateTask: This event is raised whenever a task is updated.
2. oracle.apps.cs.chg.Charges.submitted: This event is raised whenever a charge line is submitted to Order Management.

For information on business events and the manager, see the *Oracle Workflow Developer's Guide*.

1.28.1.3 Which Method to Choose

Your organization can take advantage of either or both of these methods of automating closure. Most organizations will want to turn on at least the downward propagation because it prevents agents from accidentally closing service requests that have tasks still being worked on.

If your organization delivers field service, you will also benefit from enabling upward closure. If your organization does not perform manual wrap-up of service requests after the engineers enter debrief information in the field, you can have the service requests set to a final status.

Or you can have all service requests set to a special wrap-up status that tells agents which service requests need to be wrapped up.

1.28.2 Setting Up Automatic Closure for Service Requests

Use this procedure to set up automatic closure of service requests and associated tasks.

To set up automatic closure for service requests and tasks:

1. Navigate to Setup > Others > Profile System Values.
2. If you wish to turn on downward propagation, then set the following two system profile options:
 - Set Service: Validate and Auto Close on Service Request Closure to Yes at the site level to turn on downward propagation. By default this profile is set to No.
 - Set Service: Task Auto Close Status to the status you wish to use for all tasks closed automatically. By default, this profile option is not set to any status.
3. If you wish to turn on upward propagation, then set the following two system profile options:
 - Set Service: Auto Closure of Service Request to Yes at the site level to turn on upward propagation. By default this profile is set to No.
 - Set Service: Service Request Auto Close Status to the status you wish to use for a service request that has been closed automatically. By default, this profile option is not set to any status.

1.29 Setting Up Custom Tabs on the Service Request Window

Implementers can create two custom tabs in the Service Request window by modifying the code for the Service Request form and the associated library.

The customization must be made on a view or a table that has a reference to or intersection with CS_INCIDENTS_ALL_B. The application passes the INCIDENT_ID to the control block of the form and this can be used to retrieve or save to and from the custom tabs.

This topic covers:

- Basic Information on page 1-100
- Guidelines for Setting Up Custom Tabs on page 1-101
- Parameters Passed from the Service Request Header on page 1-103
- Function Name for Custom Tabs on page 1-104

1.29.1 Basic Information

This section describes basic information for the application developer about both tabs.

1.29.1.1 Custom1 Tab

Form name: CSXSRCT1.fmb

Library name: CSSRCT1.pld

Tab page name: CSXCUST1

Canvas name: CSXSRCT1

Data block name: CSXCUST1_BLK

Control block name:CSXCUST1_CTRL_BLK

Window Name: FOLDER_INCIDENT_TRACKING

1.29.1.2 Custom2 Tab

Form name: CSXSRCT2.fmb

Library name: CSSRCT2.pld

Tab page name: CSXCUST2

Canvas name: CSXSRCT2

Data block name: CSXCUST2_BLK

Control block name: CSXCUST2_CTRL_BLK

Window name: FOLDER_INCIDENT_TRACKING

1.29.2 Guidelines for Setting Up Custom Tabs

These steps provide guidelines to help you with custom tab implementation.

Prerequisites

Knowledge of Oracle Forms development procedures and an understanding of Oracle TeleService code.

To set up the two custom tabs:

1. Customize the form using the following guidelines:
 - In the form CSXSRCT1 . fmb and/or CSXSRCT2 . fmb, create a data block with all the fields you wish to display in the custom tab.
 - Code an On Insert trigger for the data block to insert data into the tables.
 - Code an On Update trigger for the data block to update data in the tables.

- Code an On Delete trigger for the data block to delete data from the tables.
 - The fields in the data block must be placed on the tabbed canvas `CC_MAIN_CSXCUST1 . CSXSRCT1` and/or `CSXCUST2 . CSXSRCT2`
 - Any record groups and LOVs must be coded.
 - In order to integrate this with the Service Request window, you must add the data block, record groups, and LOVs for `CSXSRCT1 . fmb` to the `CSXSRCT1_OBJ_GRP` object group. Those for `CSXSRCT2 . fmb` must be added to the `CSXSRCT2_OBJ_GRP` object group.
2. Modify the library using the following guidelines:
- You can use any of the following event handlers:

Procedure Name	Description
WHEN-NEW-FORM-INSTANCE	This procedure calls <code>WHEN-NEW-FORM-INSTANCE</code> of the custom form. Code is added to this library based on the requirements of the custom form. This trigger is called from the <code>WHEN-NEW-FORM-INSTANCE</code> of the main form.
KEY-CLRFRM	This procedure calls <code>CLEAR_CTRL_FIELDS</code> , a procedure that clears the control field values populated by values from the header region. This is called from the <code>KEY_CLRFRM</code> of the main form
POPULATE_CTRL_FIELDS	This procedure populates the control fields from the main form. This is called by the <code>WHEN-NEW-FORM-INSTANCE</code> , <code>RESTART</code> , and <code>WHEN-TAB-PAGE-CHANGED</code> triggers.
SHOW_TAB_VIEW	This procedure can be used to show the stacked canvases used in the custom tab, if any. This is called in the <code>WHEN-TAB-PAGE-CHANGED</code> trigger of the main form.
HIDE_TAB_VIEW	This procedure can be used to hide the stacked canvases used in the custom tab, if any. This is called in the <code>WHEN-TAB-PAGE-CHANGED</code> trigger of the main form.
WHEN_TAB_PAGE_CHANGED	This procedure populates the control block fields and can be coded to customize any other functions. This is called in the <code>WHEN-TAB-PAGE-CHANGED</code> trigger of the main form.

Procedure Name	Description
ALLOW_ACCESS	This can be coded to enable the custom tabs. This is called in the WHEN-NEW-FORM-INSTANCE trigger of the main form.
DENY_ACCESS	This can be coded to disable the custom tabs. This is called in the WHEN-NEW-FORM-INSTANCE trigger of the main form.
CLEAR_CTRL_FIELDS	This procedure clears the control fields. This is called from the Key_Clearfrm Procedure of the custom library.
RESTART	This procedure can be used to populate the control fields. This is called from the RESTART trigger of the main form.

- All the code to handle API calls can be put in the library CSSRCT1.p1d and/or CSSRCT2.p1d.
- 3. Integrate the forms with the Service Request form:
 - a. Copy the forms CSXSRCT1.fmb and/or CSXSRCT2.fmb to the \$AU_TOP/forms/US directory in the patched environment.
 - b. Compile the corresponding library and copy CSSRCT1.p11 and/or CSSRCT2.p11 to the \$AU_TOP/resource directory in the patched environment.
 - c. Run the adadmin utility to compile CS forms and libraries so that the changes made to the custom form and library are reflected in the Service Request form.

1.29.3 Parameters Passed from the Service Request Header

The following parameters are passed from the Service Request form to the CSXSRCT1 and CSXSRCT2 forms:

Parameter	Description
CSXCUST1_CTRL_BLK. INCIDENT_ID	Identification number for the Service Request
CSXCUST1_CTRL_BLK.INCIDENT_ TYPE_ID	Identification number for the Service Request type

Parameter	Description
CSXCUST1_CTRL_BLK. INCIDENT_STATUS_ID	Identification number for the Service Request Status
CSXCUST1_CTRL_BLK. INCIDENT_SEVERITY_ID	Identification for the Service Request Severity
CSXCUST1_CTRL_BLK. INCIDENT_OWNER_ID	Identification number for the Service Request Owner
CSXCUST1_CTRL_BLK. OWNER_GROUP_ID	Identification number for the Service Request Owner Group
CSXCUST1_CTRL_BLK. INCIDENT_NUMBER	Service Request Number
CSXCUST1_CTRL_BLK. INCIDENT_DATE	Service Request Date

These parameters are populated by the POPULATE_CTRL_FIELDS procedure, which is called by the WHEN-NEW-FORM-INSTANCE trigger, the WHEN-TAB-PAGE-CHANGED trigger, and the RESTART trigger.

1.29.4 Function Name for Custom Tabs

The function name for CSXSRCT1 is CS_HA_AXS_CUSTOM1_TAB. For CSXSRCT2 it is CS_HA_AXS_CUSTOM2_TAB. You can add these functions to the CS_HA_SERVICE_REQ_FUNCTIONS to show the custom tabs.

By default, the tabs are hidden, so you must enable the function in the menu CS_HA_SERVICE_REQ_FUNCTIONS.

Either of the custom tabs can also be set as default tabs.

Note: Please back up your custom forms and libraries before applying any future CS patches for these files so they are not over-written in \$AU_TOP/forms/US and \$AU_TOP/. After the patch is applied successfully, you must copy the customized files back to these directories and run adadmin to generate CS forms and libraries.

If Oracle supplies a bug fix in the future for the custom forms and libraries you modify, then you must copy your modifications from the backup to the newer version of the files.

1.30 Integrating with Oracle Enterprise Asset Management

To make it possible for agents to view and create work orders, you must set up Oracle Enterprise Asset Management according to the procedures described in the *Oracle Enterprise Asset Management User's Guide* and set up Service Request Types with the Asset Maintenance check box selected. See Setting Up Service Request Types on page 1-15. This is the only implementation step within Oracle TeleService.

1.31 Enabling Oracle Complex Maintenance, Repair, and Overhaul

To make it possible for agents to access Oracle Complex Maintenance, Repair, and Overhaul maintenance requirements, you must implement Oracle Complex Maintenance, Repair, and Overhaul according to that application's documentation and create Service Request Types with the Complex Maintenance check box selected. See Setting Up Service Request Types on page 1-15. This is the only implementation step within Oracle TeleService.

Implementing Service Request and Task Assignment

Agents use the Universal Work Queue to obtain their work assignments which can consist of service requests and tasks. This chapter explains how to automate the assignment of service requests and tasks to group and individual work queues. It covers:

- Types of Assignment on page 2-1
- Process of Assigning Ownership Outlined on page 2-5
- Assignment Setup Variations on page 2-9
- Setting Up Automated Assignment on page 2-16
- Setting Up Service Territories on page 2-21
- Setting Up the Load Balancing Formula on page 2-24
- Specifying the Numerical Equivalents for Skill Levels on page 2-27

2.1 Types of Assignment

This topic explains the different modes of service request and task assignment. It covers:

- Overview on page 2-2
- Pull Method Explained on page 2-3
- Push Method Explained on page 2-4

2.1.1 Overview

This topic explains the differences between manual work assignment and the two modes of automated assignment.

2.1.1.1 Manual Assignment

Agents can take ownership of any task or service request in the Universal Work Queue or assign ownership of that item to a different individual provided they can access the work queue.

Manual work assignment:

- Does not take into account the priority of the item the agent chooses to work on.
- Does not prevent multiple agents from choosing to work on the same item.

2.1.1.2 Semi-automated Work Assignment

Agents can also use the Assignment Manager to help them assign work. This application foundation module can be invoked by clicking the button beside the Owner fields in the Service Request window and the Service Request tab of the Contact Center.

Agents can use the Assignment Manager in the assisted mode, in which case the Assignment Manager preselects a list of resources based on service territories and preferred resources in Oracle Service Contracts. In the manual mode, agents select a resource using a list of values of all available resources.

See the Assignment Manager Section of the *Oracle Common Application Components User's Guide* and *Oracle Common Application Components Implementation Guide*.

2.1.1.3 Automated Work Assignment

To overcome these problems, Oracle TeleService provides service organizations two ways of automating the assignment of work to agents:

- Push Method

The application assigns service request and task ownership to groups and individuals based on contracts, installed base, and service territories.

When assigning service requests to individuals, the application also takes into account qualifications, availability, and the workload of your resources.

- Pull Method

The application assigns service requests and tasks to groups, but leaves the individual agents within those groups to request ownership of those items through the Universal Work Queue.

The process for assignment of tasks and service requests is similar, but separate. This means that your organization can use one method to assign tasks and the second for service requests. However, if you use the pull method for both service requests and task, then service requests must be assigned to an owner before the application can automatically assign its tasks.

You can have the application assign a service request in two ways:

- Every time a service request is created or updated either manually or automatically.
- In batches by periodically running a concurrent program.

Tasks can be assigned automatically when the task is created or must be assigned manually by the agent.

Note: If you are having the application generate tasks automatically based on service requests types and extended attributes, then tasks are assigned to the individual you have specified in that setup, not through automatic assignment. See *Generating Tasks Based on Service Request Type and Extended Attribute Values* on page 3-11.

The application assigns a task or a service request only if the agent does not assign ownership manually and then only to agents that have the right security permissions. Agents can override any automatic assignment by making an entry in the owner fields using the lists of values.

2.1.2 Pull Method Explained

The pull method assigns work to the group work queue and permits agents to request work either by clicking the Request Work or Next Work buttons.

- Request Work

The Request Work button looks at all of the unassigned work and assigns the next highest priority item to the agent.

This button is available only in the Universal Work Queue window toolbar.

- Next Work

The Next Work button looks both in the unassigned and agent's queues and opens the next highest priority work item. If the item is unassigned the application automatically assigns it to the agent.

This button is available in both the Universal Work Queue and Service Request window toolbars.

The Universal Work Queue presents agents with the next most urgent service request or task to work on. The application determines which item is the most urgent based on the priority, due date, and time.

- For service requests:

The priority is based on a classification of the severity of the service request. This is set in the Service Request Severities window using the Priority Code LOV.

The due date is either the Respond By date (if the organization has not yet responded) or the Resolved By date.

- For tasks:

The priority is based on the Task Priority.

The due date is the task's Planned End Date.

Agents can specify that a particular task or service request is on hold by selecting a task or service request status that has been specified as being on hold. This prevents the application from displaying the same high priority item over and over again when an agent clicks the button.

Note: Although it is called the pull method, this work assignment method does automatically assign the service request or task to the group work queue. Its name is based on the fact that agents must assign the work item to themselves either by selecting it from the group work queue or by using the Next Work or Request Work buttons.

2.1.3 Push Method Explained

The push method automatically assigns work to the work queues of individual agents or groups. Agents can over-ride the automatic assignment by selecting a different owner.

Service Request Assignment

The application assigns service request ownership to individual agents or work groups and places the service request in their work queues.

Service request owners coordinate the resolution of a customer service request and monitor the completion of the various tasks different individuals within the organization must perform in order to resolve it.

If an agent manually enters a Group Owner for a service request and leaves the individual owner field blank, then the assignment engine chooses the best qualified resource from the group provided.

The autoassignment operates only on active service requests, those that have not been set to a status specified as final.

Task Assignment

The application assigns ownership of a task, an individual unit of work that must be performed to resolve the service request, to either an individual or group owner.

A task owner is responsible for the completion of the task and its entry is mandatory. Each task can also have one or more assignees who are actually responsible for completing the work.

Assignees are optional and not assigned by the application. For many types of tasks, the owner and assignee can be one and the same person. For field service tasks, the task owner is usually the dispatcher and the assignee is the field service engineer performing the work at the customer site.

2.2 Process of Assigning Ownership Outlined

This topic explains:

- How the Application Assigns Ownership of Service Requests on page 2-5
- How the Application Assigns Ownership of Tasks on page 2-8

2.2.1 How the Application Assigns Ownership of Service Requests

For both the pull and push assignment, the automated assignment process first assigns group owners for service requests.

If you are implementing push assignment to individuals, then the application assigns ownership to individual resources as a second step:

- If an agent has assigned group ownership manually on the Service Request window, then the process performs only the second step, assigning ownership to individuals within the selected group.
- If an agent assigns an individual owner, then the application does not assign a group owner.

2.2.1.1 How the Application Assigns Group Ownership for Service Requests

To determine which group queue is assigned ownership the autoassignment process:

1. Searches contracts for preferred group resources. Oracle Installed Base does not support groups for preferred resources.

You can have the process check either Oracle Service Contracts, Oracle Install Base or both by setting the profile option JTFAM: Resource Search Order. If multiple preferred groups exist, it assigns ownership to the first group it finds.

If the process finds a group owner in this step, it terminates. If multiple groups are found, then ownership is assigned to the first group found.

2. Searches for qualified resources using service territories

If the contract does not specify group ownership, then autoassignment searches for group owners using the service territories set up with Oracle Territory Manager.

If multiple groups qualify as potential owners, then the process assigns ownership to the first group on the list. If no groups qualify, then the user receives an error message.

Note: In this release, there is no optimization between multiple groups. This means that the first group is always assigned ownership, regardless whether the resources belonging to other groups may be more qualified or available to handle the service request. Workload and skills optimization works only for resources within the winning group.

3. If you are using the pull model of autoassignment, the application determines the most urgent service request to assign based on the priority, due date, and time.

The due date is either the Respond By date (if the organization has not yet responded) or the Resolved By date.

The priority is based on the classification of the severity of the service request you enter in the Priority Code field. It can have one of four values: critical, high, medium, or low.

If you wish to have the application assign ownership to groups only, then set the system profile Service: Service Request Auto Assignment Level to Group.

2.2.1.2 How the Application Assigns Service Request Ownership to Individuals

Only the push model assigns work to individual resources automatically. In this case, you must set the system profile Service: Service Request Auto Assignment Level to Individual.

The process:

1. Searches customer contracts and the installed base for preferred individual resources

The autoassignment process first checks to see if there are any preferred individual resources listed in the contracts or the installed base for the specific item. You can have the process check either contracts or the installed base or both by setting the profile option JTFAM: Resource Search Order. All resources found are included in the list of potential owners. If the process finds preferred resources here it adds them to the list of possible owners, it does not check the service territories in the next step.

2. Searches for qualified individuals using service territories

If neither the contract nor the installed base include preferred resources, then the autoassignment process checks to see if the service request attributes can be matched against any of the service territories set up with Oracle Territory Manager. If the service request can be assigned to a territory, then the individual resources listed in the territory become the potential owners.

3. Eliminates resources who are not members of the group assigned group ownership

The autoassignment process eliminates from the list of potential owners all the individual resources that are not members of the group selected as the group owner.

4. Eliminates unavailable resources

The autoassignment eliminates from the list of possible owners any resources who have indicated that they are not available. Agents can indicate they are unavailable in Oracle TeleService by deselecting the Available check box in the Resource Availability window (Tools1 > Web Availability).

5. Picks the best resource using an optimizer formula.

The formula calculates a score for each resource and selects the one with the highest score.

The calculation balances the level of skill for a resource (the sum of skill levels for the product, platform, product category, and the problem code) with the backlog of service requests of different severities (Severity 1 through Severity 4) and the difference in time zones between the customer and the agent.

You must assign weights for each of the factors in the formula for each Service Request Type and severity using the Load Balancing Weights window (Setup > Service Requests > Load Balancing Weights). You can set up different weights for each Service Request Type and service request severity. See Setting Up the Load Balancing Formula on page 2-24.

2.2.2 How the Application Assigns Ownership of Tasks

This topic explains how the automated assignment process assigns ownership of service request tasks.

Unlike service requests that can have both a group and individual owners, tasks can have either an individual or a group owner.

You must decide which type of owner you wish to assign by setting the system profile: Service: Service Request Task Auto Assignment Level:

- For the push model, you set this system profile to Individual.
- For pull, you set it to Group.

The process for assigning tasks is similar to the two-step process used to assign group ownership of service requests with a few minor differences.

The application:

1. Searches contracts and installed base for preferred group or individual resources

You can have the process check either Oracle Service Contracts, Oracle Install Base or both by setting the profile option JTFAM: Resource Search Order.

If multiple preferred resources exist, the process assigns ownership to the first it finds.

If the process finds an owner in this step, it terminates.

2. Searches for qualified resources using service territories

If neither the contract or installed base specify ownership, then autoassignment searches for group or individual owners using the service territories set up with Oracle Territory Manager.

For the push model, you must assign an individual resource to each territory. For the pull model, you must assign a group. The territories must be of the Service Request and Task transaction type.

If multiple groups or individuals qualify as potential owners, then the process assigns ownership to the first resource on the list. If no resource qualifies, then the user receives an error message.

3. If you are using the pull model of automated assignment, the application determines the most urgent task to assign based on the priority, due date, and time.

The priority is based on the Task Priority. It can have one of four values: critical, high, medium, or low. The due date is based on the Planned End Date.

The process does not use the work load balancing formula for assigning tasks to individuals.

2.3 Assignment Setup Variations

Because you can set up the assignment of service requests and tasks independently multiple setup variations are possible:

- Push for service requests only (See description on page 2-10.)
- Pull for service requests only (See description on page 2-11.)
- Push for both service requests and tasks (See description on page 2-12.)
- Push for service requests and pull for tasks (See description on page 2-13.)
- Pull for both service requests and tasks (See description on page 2-14.)
- Pull for service requests and push for tasks (See description on page 2-15.)

You can implement these variations through different setups of:

- Service territories set up with Territory Manager

- The following system profile options:

System Profile Name	Possible Values	Default Setting	Description
Service: Enable Service Request-UWQ Workitem Integration	Yes or No	No	Setting the profile to Yes makes it possible for agents to use the Request Work and Next Work buttons for service requests and service request tasks. This system profile must be set to Yes for the pull method.
Service: Service Request Task Owner Field Optional	Yes or No	No	A setting of Yes makes the Task Owner field optional. When an agent does not make an entry, this automatically triggers the task assignment functionality (both pull and push models) at the time the task is saved. The application automatically assigns the owner.
Service: Service Request Owner Auto Assignment Level	Group or Individual	Individual	This profile determines the level of autoassignment for service requests. A setting of Individual assigns ownership to a group and to an individual. A setting of Group assigns ownership to a group only. This system profile must be set to Group for the Pull Method.
Service: Service Request Task Owner Auto Assignment Level	Group or Individual	Individual	This profile determines the type of owner assigned to a service request task. A setting of Individual assigns ownership to an individual resource. A setting of Group assigns ownership to a group. This system profile must be set to Group for the Pull Method.

Explanations of the different scenarios and the relevant profile settings and territory setups for each are given below:

2.3.1 Push for Service Requests Only

Automatically assigns service request ownership to individuals or groups. Use this setup if your organization uses only service requests to assign work.

Territory Management Setups

If you are assigning service requests to groups only, then you need to create only one service territory hierarchy using group resource qualifiers.

If you are assigning service requests to individuals, then you must set up two sets of territories: one using group resources and the second with the individual resources.

Select Service Request as the Territory Transaction Type for each territory.

System Profile Settings

The following table outlines the settings of key profiles for this scenario:

System Profile Name	Valid Setting	Comments
Service: Enable Service Request-UWQ Workitem Integration	Yes or No	Setting the profile to Yes enables the Request Work and Next Work buttons.
Service: Service Request Owner Auto Assignment Level	Individual or Group	Individual or Group, depending on whether you wish to assign ownership to individual agents (more likely) or groups (less likely). The preferred setting for the push method is Individual.

2.3.2 Pull for Service Requests Only

Automatically assigns service request ownership to groups and let the individuals request ownership on their own. Use this setup if your organization uses only service requests to assign work.

Territory Management Setups

As you are assigning service requests to groups only, you need to create only one service territory hierarchy and assign group resources to each territory.

Select Service Request as the Territory Transaction Type for each territory.

System Profile Settings

The following table outlines the settings of key profiles for this scenario:

System Profile Name	Valid Setting	Comments
Service: Enable Service Request-UWQ Workitem Integration	Yes	Setting the profile to Yes to enable the Request Work and Next Work buttons. This ensures that agents are receiving the highest priority work item from among all of the assigned and unassigned items.
Service: Service Request Owner Auto Assignment Level	Group	Set to Group. The pull model requires the application to assign the service request to the agent's group.

System Profile Name	Valid Setting	Comments
IEU: Distribute: Service Request Task: Work Source	Yes	This profile enables the Universal Work Queue for pull assignment by activating tasks.
IEU: Distribute: Service Request: Work Source	No	This profile enables the Universal Work Queue for pull assignment by activating service requests.

2.3.3 Push for Both Service Requests and Tasks

Use this setup if you wish to automatically assign the ownership of both service requests and tasks to individual agents or dispatchers. This setup is appropriate for organizations where service request owners are different individuals from task owners.

Territory Management Setups

You must create three territory hierarchies:

1. For assigning service requests to groups. You must assign a group resource to each territory and select Service Request as the Territory Transaction Type.
2. For assigning service requests to individuals. You must assign an individual resource to each territory and select Service Request as the Territory Transaction Type.
3. For assigning tasks to groups, you must assign a group resource to each territory and select Service Request and Task as the Territory Transaction Type.
4. For assigning tasks to individuals, you must assign an individual resource to each territory and select Service Request and Task as the Territory Transaction Type.

System Profile Settings

The following table outlines the settings of key profiles for this scenario:

System Profile Name	Valid Setting	Comments
Service: Enable Service Request-UWQ Workitem Integration	Yes or No	Setting the profile to Yes enables the Request Work and Next Work buttons.
Service: Service Request Task Owner Field Optional	Yes	Turns on automatic task assignment and makes task owner optional.

System Profile Name	Valid Setting	Comments
Service: Service Request Owner Auto Assignment Level	Individual or Group	Individual or Group, depending on whether you wish to assign ownership to individual agents (more likely) or groups (less likely). The preferred setting for the push method is Individual.
Service: Service Request Task Owner Auto Assignment Level	Individual or Group	Individual or Group, depending on whether you wish to assign ownership to individual agents (more likely) or groups (less likely). The preferred setting for the push method is Individual.
IEU: Distribute: Service Request Task: Work Source	No	This profile enables the Universal Work Queue for pull assignment by activating tasks.
IEU: Distribute: Service Request: Work Source	No	This profile enables the Universal Work Queue for pull assignment by activating service requests.

2.3.4 Push for Service Requests and Pull for Tasks

This setup is appropriate for organizations that wish to assign service request ownership, but want to leave it up to agent or dispatcher to request task ownership.

Territory Management Setups

You must create three territory hierarchies:

1. For assigning service requests to groups. You must assign a group resource to each territory and select Service Request as the Territory Transaction Type.
2. For assigning service requests to individuals, you must assign an individual resource to each territory and select Service Request as the Territory Transaction Type.
3. For assigning tasks to groups, you must assign a group resource to each territory and select Service Request and Task as the Territory Transaction Type.

System Profile Settings

The following table outlines the settings of key profiles for this scenario:

System Profile Name	Valid Setting	Comments
Service: Enable Service Request-UWQ Workitem Integration	Yes	Setting the profile to Yes to enable the Request Work and Next Work buttons.

System Profile Name	Valid Setting	Comments
Service: Service Request Task Owner Field Optional	Yes	Yes turns autoassignment on. To implement pull for tasks, you must create your service territories with group resources rather than individual resources.
Service: Service Request Owner Auto Assignment Level	Individual or Group	Individual or Group, depending on whether you wish to assign ownership to individual agents (more likely) or groups (less likely).
Service: Service Request Task Owner Auto Assignment Level	Individual or Group	Individual or Group, depending on whether you wish to assign ownership to individual agents (more likely) or groups (less likely). The preferred setting for the push method is Individual.
IEU: Distribute: Service Request Task: Work Source	Yes	This profile enables the Universal Work Queue for pull assignment by activating tasks.
IEU: Distribute: Service Request: Work Source	Yes	This profile enables the Universal Work Queue for pull assignment by activating service requests.

2.3.5 Pull for Both Service Requests and Tasks

The application assigns ownership of service requests and tasks to the group work queue but leaves the agents to request the assignment when they are available.

This setup is appropriate for organizations that wish to let agents and dispatchers request work rather than assigning it to them. The group queues do not display any of the tasks for service requests that do not yet have an individual owner. This is because an individual service request owner is required for automatic assignment.

Territory Management Setups

You must create two territory hierarchies:

1. For assigning service requests to groups. You must assign a group resource to each territory and select Service Request as the Territory Transaction Type.
2. For assigning tasks to groups, you must assign a group resource to each territory and select Service Request and Task as the Territory Transaction Type.

System Profile Settings

The following table outlines the settings of key profiles for this scenario:

System Profile Name	Valid Setting	Comments
Service: Enable Service Request-UWQ Workitem Integration	Yes	Setting the profile to Yes to enable the Request Work and Next Work buttons.
Service: Service Request Task Owner Field Optional	Yes	Yes turns autoassignment on. To implement pull for tasks, you must create your service territories with group resources rather than individual resources.
Service: Service Request Owner Auto Assignment Level	Group	Set to Group. The pull model requires the application to assign the service request to the agent's group.
Service: Service Request Task Owner Auto Assignment Level	Group	Set to Group. The pull model requires the application to assign the service request to the agent's group.
IEU: Distribute: Service Request Task: Work Source	Yes	This profile enables the Universal Work Queue for pull assignment by activating tasks.
IEU: Distribute: Service Request: Work Source	Yes	This profile enables the Universal Work Queue for pull assignment by activating service requests.

2.3.6 Pull for Service Requests and Push for Tasks

This is a very unlikely scenario that is useful only for organizations that wish to assign tasks ahead of service requests, perhaps to give individuals a head start on tasks with long lead times.

Territory Management Setups

You must create three territory hierarchies:

1. For assigning service requests to groups. You must assign a group resource to each territory and select Service Request as the Territory Transaction Type.
2. For assigning tasks to groups. You must assign a group resource to each territory and select Task as the Territory Transaction Type.
3. For assigning tasks to individuals. You must assign an individual resource to each territory and select Service Request and Task as the Territory Transaction Type.

System Profile Settings

The following table outlines the settings of key profiles for this scenario:

System Profile Name	Valid Setting	Comments
Service: Enable Service Request-UWQ Workitem Integration	Yes	Setting the profile to Yes to enable the Request Work and Next Work buttons.
Service: Service Request Task Tab Owner Field Optional	Yes	Yes turns autoassignment on. To implement push for tasks, you must create your service territories with individual resources rather than group resources.
Service: Service Request Owner Auto Assignment Level	Group	Set to Group. The pull model requires the application to assign the service request to the agent's group.
Service: Service Request Task Owner Auto Assignment Level	Group or Individual	Set to Group. The pull model requires the application to assign the service request to the agent's group. The preferred setting for the push method is individual.
IEU: Distribute: Service Request Task: Work Source	Yes	This profile enables the Universal Work Queue for pull assignment by activating tasks.
IEU: Distribute: Service Request: Work Source	No	This profile enables the Universal Work Queue for pull assignment by activating service requests.

2.4 Setting Up Automated Assignment

Use this procedure to set up the automatic assignment of service requests.

Prerequisites

The skills-selection and load balancing portion of the autoassignment process takes into account the following skills:

- Product Category
- Product
- Problem Code
- Platform

If you wish to take advantage of skills based assignment and autobalancing, then:

- You must rate the resources on these skills for them to be included in the selection process
- The service requests to be assigned must include at least one of these three factors.

To set up automated assignment:

1. Specify whether you wish autoassignment to check for preferred resources in contracts, the installed base, or both by setting the profile option JTFAM: Resource Search Order.

The available settings are:

- Both Contracts and Install Base (this is the default value)

Autoassignment returns all preferred resources found in contracts and installed base as possible owners.

- Contracts Preferred Resource

Autoassignment uses only preferred resources found in contracts. If none are found, then and only then it searches the installed base.

- Installed Base Preferred Resource.

Autoassignment uses only preferred resources found in the installed base. If none are found, then and only then it searches contracts.

2. If you use Oracle Service Contracts and your contracts specify preferred resources, then you can restrict which resources are picked by business process by setting one or both of the following two system profile options:

- Service: Use Business Process ID in Service Request Auto Assignment

A setting of Yes limits the search for preferred resources to the business process associated with the service request type

A setting of No returns all preferred resources as possible service request owners.

- Service: Use Business Process ID in Service Request Task Auto Assignment

A setting of Yes restricts the search for preferred resources to the business process associated with the task type.

A setting of No returns all preferred resources as possible task owners.

Restricting the search for preferred resources using this two system profiles, may be required because Oracle Service Contracts can specify different resources for different business processes. For example, for field service, a contract may specify an expert engineer dedicated to fixing a particular piece of equipment for a customer. You may not wish to assign service request or task ownership to this individual.

3. If you are using pull assignment for service requests, then:

- a. Set up service request statuses that can be used by agents to designate work on a service request has been suspended. You can designate a status as suspended by selecting the On Hold check box in the Service Request Statuses window.

Pull assignment permits agents to request the next most urgent piece of work from the Universal Work Queue by clicking the Next Work button.

Placing a service request on hold excludes the service request from the pool of work evaluated by the application when the agent requests the next highest priority work item.

Without an on-hold status, the application will distribute the inactive service request over and over again if it happens to be the item with the highest priority.

See Setting Up Service Request Statuses on page 1-6 for details on status setup.

- b. Navigate to Setup > Service Requests > Request Severities and specify the priority for each service request severity in the Service Request Severities window.

The Next Work button in the Universal Work Queue presents agents with the most urgent service request to work on. The application determines which item to display based on the due date and time and priority.

The due date is either the Respond By date (if the organization has not yet responded) or the Resolved By date.

The priority is based on the classification of the severity of the service request you enter in the Priority Code field. It can have one of four values: critical, high, medium, or low.

4. Determine whether you want to enable automated assignment (both push and pull) each time a service agent creates a request using Oracle TeleService, by setting the system profile Service: FORMS - Automatic Assignment of Owner.

The available options are:

- Yes

Use this setting if you want to trigger automated assignment each time a service request is created or updated in Oracle TeleService (both the Customer Care and Service Request modules).

- No (the default setting)

Use this setting if you want to let the concurrent program Automatic Assignment of Resource for Service Request take care of the assignment instead. If you wish to assign ownership with the concurrent program, then you must set up the concurrent program to run periodically.

5. If you have implemented Oracle iSupport, then specify whether or not you wish to enable automated assignment each time a customer creates a service request on the web. This is accomplished by setting the profile option Service: HTML - Automatic Assignment of Owner.

The available options are:

- Yes

Use this setting if you want automatic assignment each time a service request is created in Oracle iSupport.

- No (the default setting)

Use this setting if you want to let the concurrent program Automatic Assignment of Resource for Service Request take care of the assignment instead. If you wish to assign ownership with the concurrent program, then you must set up the concurrent program to run periodically.

6. Select one of the assignment scenarios you wish to implement from those listed in Assignment Variations on page 2-9 and set up service territories and the profile options accordingly.

For territory setup, follow the procedures described in *Oracle CRM Application Foundation User Guide* and *Oracle Territory Manager User Guide* and the guidelines listed in Setting Up Service Territories on page 2-21.

For instructions on how to create preferred resources see *Oracle Service Contracts Implementation Guide* and *Oracle Install Base Implementation Guide*.

7. If you are automatically assigning service requests to individual resources, then:
 - a. Set up the numerical values you wish to use for each skill level as this will greatly influence assignment. See Specifying the Numerical Equivalents for Skill Levels on page 2-27.
 - b. Navigate to Setup > Service Requests > Load Balancing Weights and set up the formula the application uses to optimize assignment according to the procedure described in Setting Up the Load Balancing Formula on page 2-24.

8. If you wish to assign service requests via the concurrent program, then set up the concurrent program Automatic Assignment of Resource for Service Request to run periodically:
 - If you wish to assignment all Service Request Types of all severities and all group owners, then do not enter any parameters.
 - You can restrict running the program by entering parameters for up to five Service Request Types, severities, and group owners.

2.4.1 Post Installation Steps to Enable Service Request Automatic Assignment (Pull-Model)

Use this post installation procedure to enable Pull Assignment.

To enable Pull Assignment:

You must complete the following post installation steps to enable Pull Assignment:

1. Set profile the Service: Enable Service Request-UWQ Workitem Integration to Yes.
2. Run the concurrent program Service: Synchronize Service Requests and Work Items

This concurrent program synchronizes the Service Request schema with the UWQ metaphor schema. There are no mandatory parameters required to run this program. The program derives a default value for Priority Code attribute of Service Request Severity, if it is not yet set, based on the severity's importance level.

A work item will be created in UWQ for every open Service request. If there is already an existing work item in UWQ, and if any of the following service attributes have changed, the program will update the work item accordingly:

- On-hold and Close flag (from Status)
- Priority Code (from Severity)
- Due Date
- Owner Group Type
- Group ID
- Owner Type
- Owner ID

- Summary
- Customer ID

This concurrent program can be used to synchronize service requests work items whenever any of the Status and Severity attributes changed, such as Status On-hold or Close flags, and Severity Priority Code.

3. Run the concurrent program Service: Synchronize Service Request Task Work Items.

This program synchronizes task work items with the migrated service request work items. The work items need to be updated to indicate their new object code SR-TASKS, and implement any of the distribute dependencies defined for them. For example, SR-TASKS cannot be distributed unless the parent Service Request has been distributed. In this scenario, the SR-TASK work item is put on-hold until the parent service request has been distributed.

Note: This concurrent program should not be run before running the concurrent program which synchronizes the service requests and the work items.

2.5 Setting Up Service Territories

Use the information below as a guideline for setting up service territories according to the procedures described in *Oracle CRM Application Foundation User Guide* and *Oracle Territory Manager User Guide*.

Oracle recommends that you set up different service territory hierarchies for assigning tasks and service requests and different territory hierarchies for assigning group and individual resources.

For assigning tasks set up one of the following:

- Territories for group resources if you are using the Pull Model
- Territories for individual resources for the Push Model.

For assigning service requests, set up:

- Territories for group resources if you are using either the Push or Pull Models
- Territories for individual resources for the Push Model

Note: If you do not set up territories and the autoassignment process does not find any preferred resources in contracts or the installed base, then autoassignment generates a user error message.

When setting up territories for assigning service requests, you must select Service Request as the Transaction Type.

For task territories, you must select Service Request and Task as the Transaction Type.

The following table lists the transaction qualifiers for both service requests and tasks in the order they appear in the list of values and explains their source.

You cannot use some of the qualifiers in the current release as indicated below.

Territory Transaction Qualifier	Available for Use	UI Source / Comments
Account Code	No	Reserved for future use.
Area Code	Yes	Area code for a customer's phone number from the Phone field in the Customer region of the Service Request window.
City	Yes	City of incident address entered in the Service Request header.
Contact Preference	Yes	Customer contact preference entered in the Communication Preference field in the Service Request window.
Country	Yes	Country of incident address.
County	No	Reserved for future use.
Customer Name	Yes	Customer name entered in the Name field in the Customer region of the Service Request window.
Customer Name Range	No	Reserved for future use.
Customer Site	No	Reserved for future use.
Group Owner	Yes	Group Owner field in the Service Request window.
Inventory Item	No	Do not use. Instead, use the Product qualifier for inventory items.

Territory Transaction Qualifier	Available for Use	UI Source / Comments
Platform	Yes	Platform field on the Subject tab of the Service Request window.
Postal Code	Yes	Postal Code field of incident address.
Problem Code	Yes	Problem Code field on the Workbench tab of the Service Request window.
Product	Yes	Item field in the Service Request window header.
Product Category	Yes	Category field on the header of Service Request window.
Province	Yes	Province of incident address.
Request Creation Channel	Yes	Channel field on the header of the Service Request Window.
Request Severity	Yes	Severity field on the header of the Service Request Window.
Request Status	Yes	Status field on the header of the Service Request Window.
Request Type	Yes	Type field on the header of the Service Request Window.
Request Urgency	Yes	Urgency field on the Workbench tab of the Service Request window.
Service Contract Coverage	Yes	Coverage field on the header of the Service Request Window.
Service Item	Yes	The Service field on the header of the Service Request window
Service Request Language	Yes	Language field in the header.
State	Yes	State field of incident address.
Support Site	No	Reserved for future use.
VIP Customers	No	Reserved for future use.

The following additional three qualifiers are available for tasks only:

Territory Transaction Qualifier	Available for Use	UI Source / Comments
Task Type	Yes	Task Type field.
Task Status	Yes	Task Status field.
Task Priority	Yes	Task Priority field.

Although the Territory Management program makes it possible for you to create your territories based on product skills, Oracle recommends that you set them up on the basis of geography, or such factors as urgency and the service level agreement SLAs. The autoassignment process takes resource skills into consideration later during load balancing.

Note: Territory setup forces you to hardwire all possible resources into each territory by entering them on the Resources tab of the Territory Manager. This means that if you do choose to use territories for autoassignment, you must update the list of resources in your territories as employees are hired or change their skill sets.

2.6 Setting Up the Load Balancing Formula

The optimizer load balancing formula picks the optimal individual for service request ownership within a group by balancing the level of skill for a resource (the sum of skill levels for the product, platform, product category, and the problem code) with the backlog of service requests of different severities and the difference in time zones between the customer and the agent. Use this procedure to customize the formula by setting up the weights for each factor. The weights determine how much importance each factor is given in the calculation.

You must set up separate weights for each Service Request Type and severity combination.

Prerequisites

You must set up the numerical values you wish to use for each skill level as this will greatly influence assignment. See *Specifying the Numerical Equivalents for Skill Levels* on page 2-27.

To set up the load balancing formula:

1. Navigate to Setup > Service Requests > Load Balancing Weights.

The Load Balancing Weights window appears.

Request Type	Request Severity	Category Skill	Product Skill	Platform Skill	Problem Code Skill	Last Login Time	Severity One Count	Severity Two Count	Severity Three Count	Severity Four Count	Time Zone Difference
Flow Test	High	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Flow Test	Medium	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Depot Repa	High	10.00	10.00	10.00	10.00	.00	-1000.00	-20.00	-5.00	.00	.00
Depot Repa	Medium	10.00	10.00	10.00	10.00	.00	-1000.00	-20.00	5.00	.00	.00

2. For each Service Request Type and severity combination enter the weights to be used by the formula:
 - a. Enter the Service Request Type and severity you wish to set up using the LOVs.
 - b. Enter the weights:

The optimizer formula calculates the score for each resource as a sum of the factors multiplied by the weights you enter in this window. The resource with the highest score becomes the owner.

Score for Each Potential Owner = Category Skill(weight 1) + Product Skill(weight 2) + Platform Skill (weight 3) + Problem Code Skill(weight 4) + Time Since Last Assignment(weight 5) + Severity One Count(weight 6) + Severity Two Count(weight 7) + Severity Three Count (weight 8) + Severity Four Count (weight 9) + Time Zone Difference (weight 10)

The table below explains each factor:

No.	Factor Name	Description
1	Category Skill	Product category skill level of the resource entered in the Resource Manager. The formula uses the numeric value assigned to the proficiency level the employee.
2	Product Skill	Product skill level of the resource entered in the Resource Manager. The formula uses the numeric value assigned to the proficiency level the employee.

No.	Factor Name	Description
3	Platform Skill	Product platform skill level of the resource entered in the Resource Manager. The formula uses the numeric value assigned to the proficiency level the employee.
4	Problem Code Skill	Product code skill level of the resource entered in the Resource Manager. The formula uses the numeric value assigned to the proficiency level the employee.
5	Time Since Last Assignment	The time in minutes since the agent received the last service request assignment.
6	Severity One Count	The number of backlogged service requests of the highest severities. These include all of the severities that you have set with importance = 1. See Setting Up Service Request Severities on page 1-29.
7	Severity Two Count	The number of backlogged service requests of high severities. These include all of the severities that you have set with importance = 2.
8	Severity Three Count	The number of backlogged service requests of medium severities. These include all of the severities that you have set with importance = 3.
9	Severity Four Count	The number of backlogged service requests of low severities. These include all of the severities that you have set with importance = 4.
10	Time Zone Difference	This factor which is based on the difference between the time zone of the contact and the support site, is calculated based on the practices of Oracle's own support organization. Time Zone Difference = [Round (2.77 - Absolute Value (contact time zone - support site time zone in hours)/4)].

- Enter positive weights for the skill levels (factors 1 through 4).
- Enter negative weights for the backlog of service requests of different severities (factors 6 through 9), the Last Login Time (factor 5), and the Time Zone Difference (factor 10).
- There is no restriction on the numerical value of the weights.
- If you wish to remove a particular factor from the formula, you can assign it a weight of 0.

2.7 Specifying the Numerical Equivalents for Skill Levels

Use this procedure to specify a numerical value for each of the six default skill levels. The numerical skill level is one of the factors used by the work-load balancing formula to calculate the optimal resource to assign as the service request owner. This means that you must enter the smallest number to the Basic Skill level and the highest number to Expert. The formula assigns ownership to the resource with the highest skill level. The higher the number you enter here, the more important skill will be as a factor in the formula.

To specify the numerical equivalents for skill levels:

1. Log into HTML applications under the Resource Self Service Administrator Responsibility.
2. Select the Administration tab and Skill Levels subtab.

The Define Skill Levels page appears.

ORACLE Administration Console

Profile Sign Out Help

People Administration

Resource Skill Levels

Define Skill Levels

Update Restore

* Level Name	* Numeric Value
Not Applicable	0
Basic	20
Functional	40
Knowledgeed	60
Experienced	80
Expert	100

Update Restore

* Indicates required fields

3. If you wish, you can modify the wording for the skill level.
4. Enter a numeric value for each of the skill levels.
5. Click **Update**.

Automatic Task Generation for Service Requests

This chapter describes how to implement the automatic generation of tasks for service requests. It covers:

- Understanding Automatic Task Generation on page 3-1
- Generating Tasks on Request Types, Items and Problem Codes on page 3-5
- Generating Tasks on Request Types and Attribute Values on page 3-11.
- Customizing Automatic Task Generation on page 3-13

3.1 Understanding Automatic Task Generation

This group of topics explains the concepts behind automatic task generation. It provides:

- An overview on page 3-2
- A description of the two methods for generating tasks:
 - Method 1: Using Service Request Types, Item or Item Categories, and Problem Codes on page 3-2
 - Method 2: Using Service Request Types and Information Entered in Additional Service Request Attributes on page 3-4
- Implementation guidelines for applications other than Oracle TeleService. See Automatic Task Generation and Other E-Business Suite Applications on page 3-4

3.1.1 Overview

When an agent creates a service request, the application can automatically generate tasks that will be used in the resolution of the customer problem. This makes it possible for an agent to schedule a repair on the first call rather than having the dispatcher to call the customer back, for instance.

Automatic task generation is most useful for known problems that have standard resolutions. If agents need to research the problem, by using the knowledge base and other methods, then the tasks required to resolve the problem will vary.

The generated tasks appear in the Task tab of the service request and must be assigned and scheduled by the agent handling the service request or through automatic assignment.

Using the procedures described in this topic group, you can automatically generate tasks based on one of the following two types of criteria:

- A combination of the Service Request Type, the item or item category, and problem code

For example, a manufacturer of laboratory equipment can automatically set up tasks to send different diagnostic equipment to a customer's site depending on what equipment type and model the customer owns.

- Service Request Type and information entered in additional service request attributes you have set up

For example, a city's solid waste department can automatically create tasks to send a different truck depending on the size of the item to be picked up.

You must choose between the two methods, which are mutually exclusive at the site, application, or responsibility level, by setting the profile Service: Auto Generate Tasks on SR Create.

3.1.2 Method 1: Using Request Types, Item Information, and Problem Codes

To automatically generate one or more tasks based on Service Request Types, Item or Item Categories, and Problem Codes, you:

1. Set up templates for task generation using the Task common application module. The templates are called Task Group Templates because they can be used to generate one or more tasks.
2. Map the task group templates to the conditions that will trigger task creation.

You can map a task group template to one or more of the following:

- A Service Request Type
- A problem code
- An item or item category

For any service request, the application creates tasks from only one task group template.

Because mappings you create can overlap, however, you must set up a set of rules for the application to determine which mapping to choose in case they do.

For example, for customers reporting blurred images on their X-ray machines, a medical diagnostic equipment company may wish to send a technician to assess the nature of the problem first if the caller doesn't know the make or the model of the machine they own. But if a customer calls in with the details, the company may send a repair crew with the correct parts right away.

In this case, the company creates two mappings:

Mapping 1

Mapping Object	Value
Service Request Type	Image Problems
Item Category	X-ray machines

The mapped task template group creates a task to send a technician to investigate the nature of the problem.

Mapping 2

Mapping Object	Value
Service Request Type	Image Problems
Item	Acme X-ray Model #1

The mapped task template group creates a task to send a repair crew with the correct parts.

If an agent creates a service request for a problem with the Acme X-ray machine Model #1, both mappings are valid.

To handle the overlapping case, the company sets up a rule that in case both mappings apply, the application chooses the most specific mapping.

3.1.3 Method 2: Using Request Types and Additional Attributes

If you have set up your Service Request Types to capture additional information, (see Capturing Additional Service Request Attributes on page 1-49), you can generate tasks based on a combination of the Service Request Type and the information agents or customers enter.

Suppose, for example, that a government agency sets up the Abandoned Vehicle Service Request Type to capture additional information required to deal with the problem.

Whenever agents create a service request of type “Abandoned Vehicle”, the application presents them with a list of questions: What is the make of the vehicle?, the model?, The color?, The license plate number?, Does it carry hazardous materials?

You can set up the application to automatically create a task based on the values an agent enters in any attribute. For example, if the agent specifies that the vehicle is a bus, the application creates a task to send a large tow truck. If the vehicle is a passenger car, the task will be for a small tow truck. If the vehicle carries hazardous materials, the application creates an additional task to alert the hazardous materials team.

Optionally, you can set up the task to launch an Oracle Workflow process and pass to it parameters you specify.

3.1.4 Automatic Task Generation and Other E-Business Suite Applications

If you are implementing other Oracle E-Business Suite Applications that use service requests, here are a few considerations for implementing automatic task generation:

- Oracle iSupport
Customers creating service requests in Oracle iSupport only see the tasks if you set them to the status of Public.
- Oracle Knowledge Management

Oracle Knowledge Management makes it possible for solutions to include task templates agents can use these to generate tasks manually. If you are using this feature, you may wish to restrict automatic task creation to Service Request Types that do not require knowledge management searches to prevent the accidental creation of duplicate tasks.

- Oracle Enterprise Asset Management and Oracle Complex Maintenance, Repair, and Overhaul

These two applications do not use tasks for assigning work, so you do not want to set up automatic task generation for the Service Request Types for these applications.

3.2 Generating Tasks on Request Types, Items, and Problem Codes

This group of topics explains how to implement the automatic generation of tasks based on Service Request Types, item or item categories, and problem codes.

The general procedure for the setup is covered in Setup Procedure Overview on page 3-5.

The other topics provide details for:

- Viewing Task Template Mappings on page 3-6
- Specifying Conditions for Task Generation on page 3-7
- Updating a Task Template Group Mapping on page 3-8
- Setting Up Rules for Handling Multiple Valid Mappings on page 3-9

3.2.1 Setup Procedure Overview

This procedure outlines the steps for implementing automatic task generation based on Service Request Types, item or item categories, and problem codes.

To set up automatic task creation:

1. Set the system profile option Service: Auto Generate Tasks on SR Create to **Task Template Mapping**.
2. Create task group templates according to the procedures described in *Oracle Common Application Components Implementation Guide*. Each task group template

can generate multiple tasks. When creating task templates, select **Service Request** as the document type.

3. Specify the factor or combination of factors that will trigger the task or tasks to be generated. See *Specifying Conditions for Task Generation by Creating Task Template Mappings* on page 3-7.
4. Create the set of rules that determine which tasks get generated should a service request match more than one mapping. See *Setting Up Rules for Handling Multiple Valid Mappings* on page 3-9.

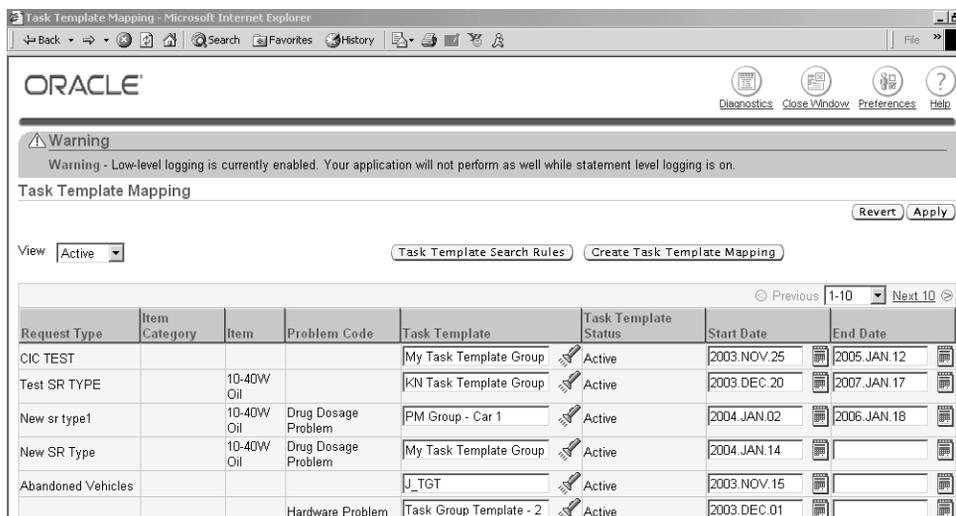
3.2.2 Viewing Existing Task Template Mappings

Use this procedure to display existing task template mappings.

To display task template mappings:

1. Navigate to Setup > Service Requests > Task Template Mapping.

The Task Template Mapping page appears in a browser window displaying existing mappings.



From this page you can:

- Create a mapping by clicking **Create Task Template Mapping** and following the procedure outlined in *Specifying Conditions for Task Generation by Creating Task Template Mappings* on page 3-7.
- Specify which tasks get generated should a service request match more than one mapping by clicking **Task Template Search Rules** and defining the rules as described in *Setting Up Rules for Handling Multiple Valid Mappings* on page 3-9.
- Update a mapping by selecting a different template or remove a mapping from use by specifying an end date.

3.2.3 Specifying Conditions for Task Generation

Use this procedure to specify the conditions that trigger tasks to be automatically generated at service request creation. This is called a task template mapping.

Prerequisites

You must create task group templates before you can map them.

To create a task template mapping:

1. Navigate to Setup > Service Requests > Task Template Mapping.
The Task Template Mapping page appears.
2. Click **Create Task Template Mapping**.
3. The Create Task Template Mapping page appears.

ORACLE

Diagnostics Close Window Preferences

Task Template Mapping > Create Task Template Mapping

Create Task Template Mapping

When a service request is created, the system will automatically generate tasks for the Task Group Template selected below.

Request Type

Product Relationship None
 Item Category
 Item

Problem Code

Start Date 10-Nov-2003

End Date

Task Group Template

Revert Apply

4. Select the object or combination of objects you wish to map:
 - For Service Request Types, use the Request Type list of values (the flashlight icon) to make your selection.
 - If you wish to map to an inventory item or an item category, then select either the Item or the Item Category radio button and use the list of values to make your selection.
 - For problem codes, use the Problem Code list of values.
5. If you wish to limit the availability of this mapping, then enter dates in the Start Date and End Date fields.
6. Select the task template group using the Task Group Template list of values.
7. Click **Apply** to save your mapping.

The new mapping appears in the Task Template Mapping page.

3.2.4 Updating a Task Template Group Mapping

You cannot specify a different set of objects in a mapping after you have saved it. However, you update a mapping by:

- Selecting a different task template group so that different tasks get generated.
- Removing a mapping from use by end-dating it.

To update a task template group mapping:

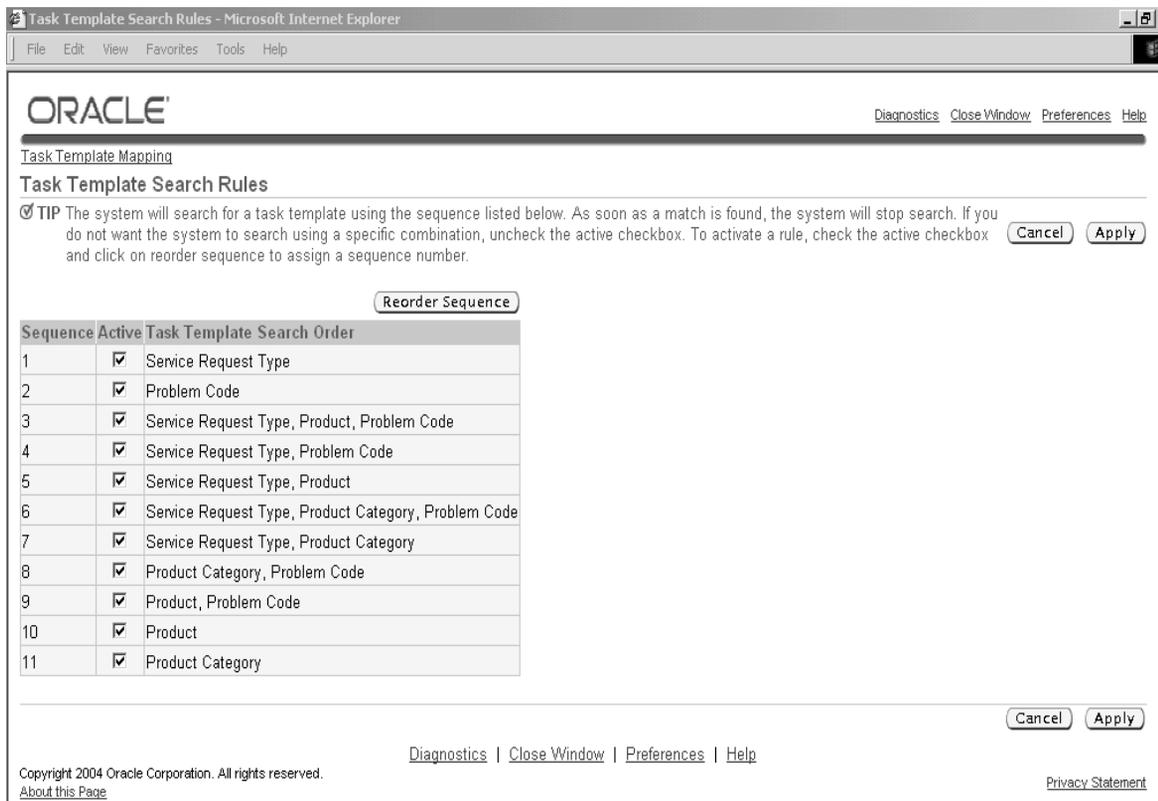
1. Navigate to Setup > Service Requests > Task Template Mapping.
The Task Template Mapping page appears.
2. If you wish to map a different task template, then use the Task Template list of values to select it.
3. If you wish to remove a particular mapping from use, then enter a past date in the End Date field.
4. Click **Apply**.

3.2.5 Setting Up Rules for Handling Multiple Valid Mappings

Use this procedure to set up rules that determine which task group template the application uses to generate tasks when a service request satisfies the criteria for more than one mapping.

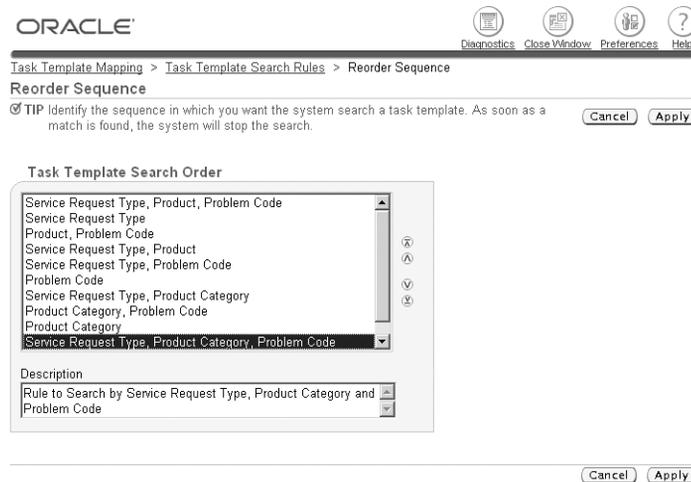
To set up rules to choose among multiple valid mappings:

1. Navigate to Setup > Service Requests > Task Template Mapping.
The Task Template Mapping page appears.
2. Click **Task Template Search Rules**.
The Task Template Search Rules page appears displaying all of the existing search rules.



3. Select the task template search order you wish to use using the Active check boxes.
4. Click **Reorder Sequence** to determine the sequence in which the application picks the templates.

The Reorder Sequence page appears listing the active templates.



5. Move the templates in the list to the order you desire using the arrow controls on the right.
6. Save the sequence by clicking **Apply**.

3.3 Generating Tasks on Request Type and Attribute Values

Using this procedure you can set up the automatic generation of tasks based on the values of additional attributes you have set up for a Service Request Type.

Prerequisites

You must set up the attributes for the Service Request Type first. See Capturing Additional Service Request Attributes on page 1-49.

If you wish to modify task types or create additional ones, then follow the procedures in Customizing Automatic Task Generation on page 3-13.

To generate tasks based on extended attribute values:

1. Set the system profile Service: Auto Generate Tasks on SR Create to **Task Type Attribute Configuration**. To set it:
 - a. Navigate to Others > Profile System Values.

The Find System Profile Values window appears.

- b. Make sure Site and Profiles with no values check boxes are selected.
 - c. Enter %Auto Generate% as the search term in the Profile field.
The System Profiles window displays the profile option.
 - d. Make your selection and save.
2. Navigate to Extended Attribute Configuration > Service Request Task Attribute Details.

The Service Request Types search window appears.

3. Select the Service Request Type you wish to set up.
4. The Service Request Task Type Configuration window appears.

The screenshot shows the 'Service Request - Task Type Attribute Configuration' window. It is divided into several sections:

- Service Requests:** Type: Abandoned Vehicle, Description: Abandoned Vehicle Service Request.
- Service Request Attributes:** A table with columns: Task Type, Name, Operator, Value, From, To.

Task Type	Name	Operator	Value	From	To
Follow up action		Equals		22-OCT-2003	
Meeting	Hazardous material?	Equals	Yes	22-OCT-2003	
Email Notification	Hazardous material?	Equals	Yes	07-OCT-2002	
Dispatch	Is vehicle blocking tra	Equals	Yes	07-OCT-2002	
- Task Type Attributes:**
 - Subject: Task Type:Follow up Action
 - Description: Priority low, Status:open, publish
 - Priority: Low
 - Status: Open
 - Publish
 - Private
 - Owner Type: Employee Resource
 - Owner: Daugherty, Mr. John
 - Assignee Type: (empty)
 - Assignee: (empty)

5. Set up the rules for creating tasks based on attribute values in the Service Request Attributes region. For each rule:
 - a. If required, create a new entry line by clicking **New**.
 - b. Use the Task Type list of values (LOV) to select the task type for the task to be generated.
 - c. Using the Name LOV, select the attribute.

- d. Select the = operator. This is the only operator supported in this release.
- e. In the Value field enter the value to trigger the task generation. If you have set up the attribute with a list of values, then you must select the value. If you have not, then you must enter the value as text.
- f. On the Mandatory tab, enter the details of the task, such a description, its default status, priority, publish flag, private flag. The application uses the information for creating tasks.

Note: You must enter a task owner, the individual responsible for the completion of the task. This means that you cannot automatically assign tasks created in this way via automatic assignment.

Select the Publish flag if you wish the task to display in Oracle iSupport where it can be viewed by customers.

6. If you wish to trigger a workflow for this task when it is created, then you must associate the workflow with the task type in the Task Types window. (See Defining Task Types on page 3-15).
7. If you have set up a workflow for this task and wish to pass it additional task attributes, then select the Optional tab and select the values for the attributes there. See Customizing Automatic Task Generation on page 3-13.

3.4 Customizing Automatic Task Generation

This group of topics provides guidelines and procedures for customizing the automatic task generation process.

- For an overview see About Customizing Automatic Task Generation on page 3-14.
- For a high-level overview of a customization, see Customizing Task Generation Using Oracle Workflow and Additional Task Attributes on page 3-14.
- For an example of such a customization see Sample E-mail Notification Workflow Customization on page 3-22.

The rest of the topics provide detailed procedures for specific tasks. For information on how to perform generic task setups, see:

- Defining Task Types on page 3-15

- Defining Task Status on page 3-17
- Defining Task Priority on page 3-19

For details on Oracle TeleService task attribute setups, see:

- Defining Additional Attributes for Tasks on page 3-20
- Mapping Additional Attributes to a Task Type on page 3-20

3.4.1 About Customizing Automatic Task Generation

There are multiple ways you can customize the automatic task generation process. Some customizations involve modifying the standard task setups performed in the Tasks module. For example, you can create additional task types, statuses, and priorities.

You can also set up a task to automatically launch an Oracle Workflow process, by associating the process with a task type. (This is done in the same Task Type window where you set up task types. See Defining Task Types on page 3-15.)

These standard setups are described in the topics below and in the Task Manager section of the *Oracle Common Application Components Implementation Guide*.

Oracle TeleService provides you with additional functionality that makes it possible for you to create task attributes you can use to pass additional information into an Oracle Workflow process.

Suppose, for example, that a government department handling hazardous material spills needs to notify different individuals via e-mail depending on the type of the material involved in a spill.

To do this, the department creates an Oracle Workflow process which automatically sends the e-mail notification and maps it to the task type. The department sets up additional task attributes to pass the text of the e-mail, the e-mail address of the individual to be notified, and other information.

This way the workflow can send different e-mails to different individuals depending on whether the spill involves acid or radioactive material, for example.

3.4.2 Customizing Using Oracle Workflow and Additional Task Attributes

This topic outlines the steps for customizing automatic task generation using Oracle TeleService's task attribute feature. Oracle provides a sample e-mail notification workflow customization. (See Sample E-mail Notification Workflow Customization on page 3-22.)

To customize task generation with a workflow using task attributes:

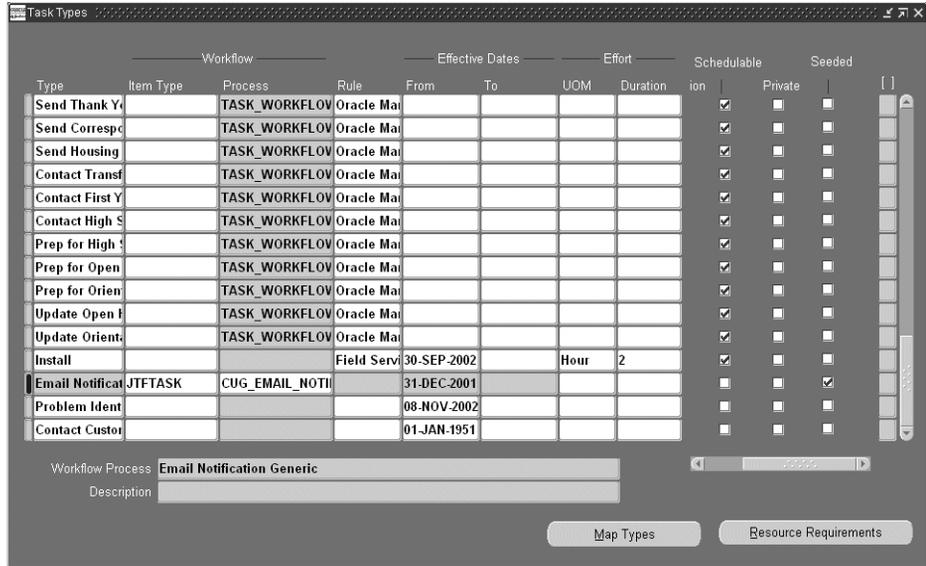
1. Create the Oracle Workflow process with the attributes you wish to capture and upload it into the Service Request item type.
2. Create a task type and associate it with the workflow. See Defining Task Types on page 3-15 for details.
3. Create the additional attributes you wish to pass to the Workflow process according to the procedure described in Defining Additional Attributes for Tasks on page 3-20.
4. Map the attributes to the Task Type and enter the values to be passed into the task attributes. See Mapping Additional Attributes to a Task Type on page 3-20.

3.4.3 Defining Task Types

Use this procedure to set up and modify task types. While the primary function of task types is to classify tasks, you can use task types to specify the types of resources that can be assigned, determine whether the tasks are schedulable for Oracle Field Service, and to automatically launch workflows when tasks of this type are created. For further information see the tasks section of the *Oracle Common Application Components Implementation Guide*.

To define task types:

1. Navigate to Setup > Task Management > Task Types.
The Task Types window appears.



2. If you are creating a new task type, click **New** in the toolbar to insert a new row for entering task type.
3. In the Type field, enter a name for the task type. This is the name of the task type agents see in the list of values.
4. If you wish to launch a workflow each time with this task type then:
 - a. For Item Type, select JTFTASK. This is the only selection available.
 - b. Use the Process LOV to select the workflow. The Task Workflow and Description fields towards the bottom of the window display information about the workflow.
5. If you are planning to use this type for Oracle Field Service, then select Field Service using the Rule field LOV.
6. Make entries in the Effective Dates From and Effective Dates To fields if you wish to limit the availability of this type.
7. If you wish to specify the amount of time this task should take, then:
 - a. In the UOM field, select the unit of measure for quantifying the effort for the task type.

- Assigned
- Working
- Closed

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

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

To define task status:

1. Navigate to the Task and Escalation Status window.
2. Define a type name and enter it in the Status field.
3. Enter a brief description of the status type in the Description field.
4. Enter the effective dates in the From and To fields.
5. Select the appropriate task status check boxes. The following check boxes are available:
 - Task Status
 - Assignment Status
 - Assigned
 - Working
 - Schedulable
 - Accepted
 - Rejected
 - Onhold
 - Approved
 - Completed
 - Cancelled
 - Delete Allowed
 - Closed

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

Use this procedure to define transition values.

 - a. Click Define Transition.

The Status Transition window opens.
 - b. In the Rules tab, enter a name for the user privilege relationship in the Rule Name field.
 - c. Enter an initial and final status type for the user.

Use the initial and final status values to determine the user's range for selecting task status.
 - d. In the Responsibility tab, enter the pre-determined rule name.
 - e. Enter a user type in Responsibility Name field and click OK.

A transition value stipulating user status privilege now exists.
 - f. Save your task status type.

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

3.4.5 Defining Task Priority

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

To define task priority:

1. In the Tasks window, click Navigator on the Task toolbar.
2. In the Task Manager Navigator, double-click Setup to expand the node.
3. Select Task Priority and click **OK**.

The Task Priority window opens.
4. Define a name and enter it in the Priority field.
5. Enter a numerical value in the Importance field.

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

6. Enter a brief description of the priority value.
7. Enter the effective dates in the From and To fields.
8. Select Seeded to restrict the edit of task priority from future users.
9. Save your task type.

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

3.4.6 Defining Additional Attributes for Tasks

You can define additional attributes in the lookup CUG_TASK_TYPE_ATTRIBUTES.

To define additional task type attributes:

1. Under the Application Developer Responsibility, navigate to Lookups > Application Object Library.
The Application Object Library Lookups window appears.
2. In the Type field, use the Query Enter / Query Run method to display the lookup CUG_TASK_TYPE_ATTRIBUTES.
3. Set up each question or prompt on a separate row (you can create additional rows by clicking **New** in the toolbar):
 - a. In the Code field, enter a unique code. This code is for internal use only and does not get displayed to agents or users.
 - b. Enter the attribute name in both the Meaning field and Description field.
4. Click **Save** in the toolbar.

3.4.7 Mapping Additional Attributes to a Task Type

Use this procedure to map additional task attributes to a task type. Doing so makes it possible for you to pass values of these attributes to an Oracle Workflow process you have created.

Prerequisites:

- Create the task types
- Create the attributes in the CUG_TASK_TYPE_ATTRIBUTES lookup.

- If you wish to use a list of values to pass values to an attribute, then you must create the lookups with the values first.

To map additional attributes to a task type:

1. Navigate to Extended Attribute Configuration > Task Type Attributes.

The Task Type Attribute Configuration window appears.

Name	List Name	Default Value	Mandatory	Displayed	Effective Dates	
					From	To
Approver			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-OCT-2002	
Comments			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-OCT-2002	
Email Remainder Counter			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-OCT-2002	
Message Body			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-OCT-2002	
Message Footer			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-OCT-2002	
Message Header			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-OCT-2002	
Offset for Due Date			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-OCT-2002	
Requester			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-OCT-2002	
Subject			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-OCT-2002	
UOM for Due Date			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-OCT-2002	

Attribute Description: Approver

2. Use the Name list of values (LOV) to select the task type you wish to set up.
3. In the Task Type Attributes region, enter the attributes you wish to map:
 - a. Using the Name LOV, select the attribute from those you have defined in the CUG_TASK_TYPE_ATTRIBUTES lookup.
 - b. If you are going to be using a list of values to select values for the attributes, then use the List Name LOV to select the lookup where you defined the valid values.
If you do not select a lookup here, you can enter text instead.
 - c. If you have not selected a lookup in the previous step, then, optionally, enter a default value for this field.
 - d. Enter an integer in the Sequence field corresponding to the order you wish to present the prompt. The prompts are displayed in descending order.

- e. If you wish to make entry optional, then deselect the Mandatory check box. This check box is selected by default.
 - f. The Displayed check box must be selected to display the attribute. This check box is selected by default.
4. Save your work.

3.4.8 Sample E-mail Notification Workflow Customization

To illustrate how you can customize automatic task generation, Oracle includes a sample customization that sends an e-mail when a task of type Email Notification is created with content you specify in the additional attributes.

The sample customization includes:

- The Email Follow-up task type set up with additional task attributes
- The Email Generic Notification Process, an Oracle Workflow process that sends an e-mail via the workflow mailer.

If you wish to use this sample e-mail customization, then follow the steps described in Enabling Sample E-Mail Workflow Process on page 3-24.

3.4.8.1 E-mail Follow-up Task Type

The following table lists the sample Email Follow-up task type attributes which pass information to the Email Generic Notification workflow process. The second column of the table explains what entries you can make for each attribute.

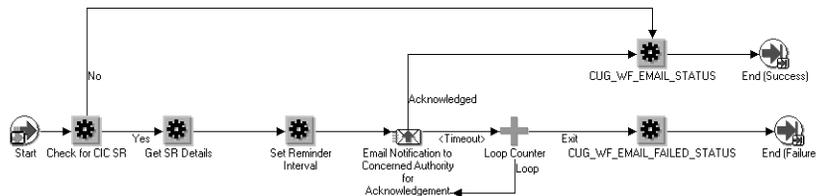
Attribute	What You Enter
Approver	A user name of a user with an e-mail address. The approver is the message recipient.
Subject	Text that appears as the subject of the e-mail message.
Message Body	Text of the message.
Requester	A user name of a user with an e-mail address. The requester is the person who is listed as the sender
Message Header	Text which appears as the header of the message.
Message Footer	Text which appears as the footer of the message.
Email Reminder Counter	The number of reminders you wish to send to the requester.

Attribute	What You Enter
UOM for Due Date	Unit of measure for the due date: DAY, WEEK, MONTH
Offset for Due Date	The number of days, weeks, or months.

Notes: For the Approver and Requester task type attribute you must enter an Oracle Application user name. This is defined in the Users window under the System Administrator Responsibility. The Email Notification workflow uses the e-mail address entered for the user in the same window.

3.4.8.2 Email Notification Generic Process

The following diagram illustrates the sample workflow process Oracle Workflow Process Email Notification Generic (CUG_EMAIL_NOTIFICATION)



1. The process initiates when a task of type Email Follow-up is created.

Note: You must make sure that the workflow is mapped to the task type in the Task Type window.

2. The process gets the task attribute details (requester, approver, subject, etc.) from the values you enter on the Optional tab of the Task Type: Attribute Configuration window.
3. The process sets a due date for the approver to acknowledge the e-mail notification. The due date is set based on the service request creation date and the number of days you enter in the Offset for Due Date attribute.
4. The process sends an e-mail to the Approver with the text you entered in the Subject, Message Header, Message Body, and Message Footer attribute.

5. If the approver does not acknowledge the message by the end of the due date, the process sends a reminder notification. The process sends the number of reminders you specify in the Email Remainder Counter attribute. If the approver acknowledges any of the notifications (the original or a reminder), the workflow terminates.
6. If the approver does not respond, the workflow sends the maximum number of reminders. The work flow then fails and terminates.
7. When the process completes successfully, the workflow updates the task status to Completed. If the processing fails, the process sets the task status to Cancelled. You can modify these statuses by setting the following system profiles:
 - CUG_TASK_FAILED_STATUS
 - CUG_TASK_SUCCESS_STATUS

3.4.8.3 Enabling Sample E-mail Workflow Process

Use this procedure to enable the sample Email Workflow.

To enable the sample e-mail workflow process:

1. Navigate to Setup > Task Management > Task Type.
2. For the Email Follow-up task type:
 - a. Enter CUGTASKS in the Item Type field.
 - b. In the process field, enter CUG_EMAIL_NOTIFICATION.
3. Save.
4. Make sure that the notification mailer is set up. See Setting Up Notification Mailers in the *Oracle Workflow Administrator's Guide*.

Implementing Customer Care

This chapter presents a detailed description of the setup and implementation steps required to successfully implement the Customer Care module of Oracle TeleService.

Note: Please use the Customer Support Responsibility for performing the setup procedures detailed in this chapter unless indicated.

This following topics are covered:

- Setting Up Customer Profiles on page 4-2
- Setting Up Relationship Plans on page 4-28
- Setting Up Critical Customers on page 4-51
- Setting Up Quick Menu on page 4-51
- Setting Up Wrap-up on page 4-53
- Setting Up Party and Account Numbering on page 4-54
- Specify Global Address Formatting and Address Validation on page 4-54
- Setting Up Custom Tabs on the Contact Center on page 4-59
- Enabling E-Mail for the Contact Center on page 4-61
- Setting Up Search Preferences on page 4-62
- Modifying the Behavior of Contact Center Tabs on page 4-65
- Modifying the Behavior of the Contact Center Header on page 4-81

- Enabling Telephony on page 4-84
- Enabling Oracle Knowledge Management on page 4-85
- Enabling Oracle Scripting on page 4-85
- Specifying the Defaults for Overriding Customer Criticality on page 4-86

4.1 Setting Up Customer Profiles

Customer profiles make it possible for you to provide agents with summaries of key customer information, such as the number of open service requests or expiring contracts.

Agents can view the summarized customer information in two places:

- The Dashboard tab
Available in the Contact Center (Oracle TeleService) and E-Business Center (Oracle TeleSales).
- The Profile window
Available in the Service Request and Override Customer Criticality windows in Oracle TeleService and the Repair Order window in Oracle Depot Repair.

Setting up customer profiles is also a prerequisite for implementing relationship plans. While the information on the Dashboard tabs and Customer Profile windows summarizes key information about customers, they require agents to check that information periodically. Relationship plans, described in a separate section of this guide, automatically display an alert message or a script when a customer meets certain conditions based on your customer profile setup.

Note: Customer profiles are not the same as system profile options.

For a brief overview of customer profile concepts, see About Customer Profiles on page 4-3.

For an overview listing the major steps of the setup procedure, see Overview of Customer Profile Setup on page 4-6.

Details of individual steps are covered in the following topics:

- Defining Profile Ratings on page 4-7

- Associating Ratings with Colors on page 4-9
- Defining Profile Check Categories on page 4-10
- Defining Profile Check Variables on page 4-11
- Defining Profile Checks on page 4-17
- Defining Drill-Downs for a Profile Check on page 4-13
- Grouping Profile Checks for Display in Customer Profile Windows on page 4-22
- Grouping Profile Checks for Display in Dashboard Tabs on page 4-24
- Determining Access by Module and Responsibility on page 4-26
- Running the Customer Profile Engine on page 4-28

4.1.1 About Customer Profiles

Customer profiles make it possible for you to provide agents with:

- Summaries of key customer information in a graphical format
- The ability to drill down to the details of the information the profiles highlight

You can specify access to customer profiles by application and by Responsibility, so that agents working on different types of customer problems receive different customer views.

4.1.1.1 Summaries of Key Customer Information

Customer profiles make it possible for you to create summaries of key customer information, called profile checks. Profile checks can summarize information by customer, by account, or by customer contact.

Profile checks can be of two types:

- Variable
- Yes and No (Boolean)

Variable

The variable profile checks tell agents the level of a particular customer, account, or contact attribute, such as the number of open service requests or the number of booked orders. Each profile check displays a number (the number of open service requests or expiring contracts, for example), a rating (high, medium, low) and a

color (green, yellow, and red, for example). The rating and color together comprise a rating label.

Yes and No (Boolean)

Boolean profiles compare the level of a profile check variable against a constant or an expression with one or more variables and returns either a Yes or No. For example: "Does the customer, account, or contact have more than one open escalation?"; "Does the customer have a credit hold?".

Summaries Displayed in a Graphical Format

Agents can view the customer information summarized by the profile checks in two places:

- The Dashboard tab
 - The Dashboard tab displays the summarized customer information organized in distinct regions called dashboard groups. These regions are separated by headings called categories.
- The Profile window
 - The Profile window displays a list of select profile checks in the order you determine. Profile windows do not use category headings.

Here is a sample Dashboard on the Contact Center showing key customer information organized in three dashboard categories: Service, Tasks, and Contracts.

Critical Customer No Last Refresh Date 24-DEC-2003 19:13:17 <input type="checkbox"/> View By Account Refresh (↻)			
Service			
Escalated SRs	53		High
Open Service Requests	3196		High
New SR	3196		High
Tasks			
Accepted Tasks	29		High
Approved Tasks	112		High
Open Tasks	581		High
Contracts			
Active Contracts	329		High
Entered Contracts	25		High

Agents can filter their views of profile checks by account, customer, or contact by making a selection from View Details For drop-down list on the header.

Agents can drill down to the individual item in this window by clicking on one of the displayed fields.

The item displays in an application window. This is called the second-level drill-down.

4.1.2 Overview of Customer Profile Setup

Use this overview of major setup steps to guide you through the customer profile setup.

To set up customer profiles:

1. Set up the rating labels (the wording and colors) you will use with your profile checks and the categories you wish to use to organize the profile checks on the Dashboard tab:
 - a. Navigate to Setup > Customer Care Lookups.
 - b. Define the general labels you wish to use to classify customer information for agents. For example, you may wish to classify customers into three categories, Low, Medium, and High. See Defining Profile Ratings on page 4-7 details.
 - c. Navigate to Setup > Customer Management > Customer Profiles.
 - d. On the Preferences tab, associate the profile ratings you have defined with color codes to create rating labels. For example, you may wish to display red next to the word High. See Associating Ratings with Colors on page 4-9.
 - e. On the same tab, define the headings (categories) which organize the profile checks on the Dashboard. See Defining Profile Check Categories on page 4-10.
2. Navigate to Setup > Customer Management > Customer Profiles.
3. On the Profile Variable tab, define the variables you wish to use in your profile checks. This is where you enter the SQL queries that retrieve and summarize your customer data. You can use the same variable in multiple profile checks.
For details see Defining Profile Check Variables on page 4-11.
4. On the Profile Checks tab, define all of the profile checks you want to use to summarize customer information in the Profile windows and Dashboard tabs. You get to select which agents see them in a subsequent step. See Defining Profile Checks on page 4-17.

5. On the Drilldown tab, set up the two levels of drill-downs your agents will use to view the details of the customer information summarized by the profile check. The first level provides a window with a list of individual records; the second level displays the individual record itself. See *Defining Drill-Downs for a Profile Check* on page 4-13.
6. On the Profile Groups tab, define the groupings of profile checks for display in the customer Profile window. By matching these profile groups to application modules and responsibilities in a later step, you can create different customer overviews for different groups within your organization. See *Grouping Profile Checks for Display in Customer Profile Windows* on page 4-22.
7. On the Dashboard Groups tab, define the groupings of profile checks for display in the Dashboard tabs of the Contact Center and E-Business Center windows. By matching these profile groups to application modules and responsibilities in a later step, you can create different customer overviews for different groups within your organization. See *Grouping Profile Checks for Display in Dashboard Tabs* on page 4-24.
8. On the Preferences tab, specify which application modules and which application responsibilities can view the profile groups and dashboard groups you have created. See *Determining Access by Module and Responsibility* on page 4-26.
9. Set up the concurrent program that will automatically refresh the Dashboard tab and Profile views of customer information. See *Running the Customer Profile Engine* on page 4-28.
10. You can have the application refresh the customer information on the dashboard each time an agent displays a customer by setting the profile Customer Care: To Allow Auto Refresh Facility for Dashboard to Yes. A setting of No requires the agent to click the Refresh button to update the display. See *Setting Automatic Refresh of Profiles on the on page 4-29 Dashboard* for more details.

4.1.3 Defining Profile Ratings

Use this procedure to modify or create the labels used to describe the ranges of values of your profile checks. The application provides three seeded values: High, Medium or Low. These labels are called profile ratings.

Profile ratings are implemented in Customer Care using standard Oracle Applications lookup codes. Profile rating codes are implemented with the User

access level. This means that you can create new labels and modify the seeded values.

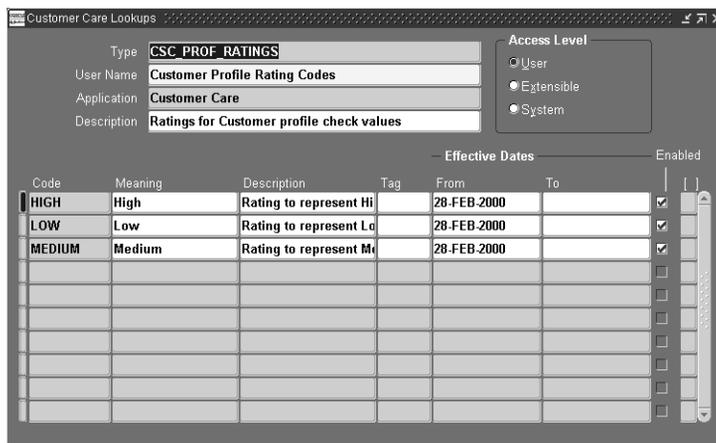
Prerequisites

None

To define profile ratings:

1. Navigate to **Setup > Customer Care Lookups**.

The Customer Care Lookups window appears.



2. In the Type field perform a search using the Query by Example method on CSC_PROF_RATINGS.

The window displays the three predefined ratings, High, Medium, and Low, and any others your organization has defined.

3. To create a new rating code:
 - a. Place your cursor in a row and click **New** in the toolbar.
 - b. Enter a name in the Code field. You will be associating this name while building the profile checks.
 - c. Enter a name in the Meaning field. This is the wording agents will see on the Dashboard tab and Customer Profile window.
 - d. Optionally, enter a description in the Description field.

The Tag field is not used.

- e. If you wish to control the dates this rating code is to be effective, then enter dates in the Effective Date fields.
4. Verify that the Enabled check box is selected.
5. Save your work.

4.1.4 Associating Ratings with Colors

Use this procedure to associate colors with the ratings you defined to create a rating label. It is here that you specify, for example, that the label High will always display in the Dashboard and Customer Profile windows together with the color red.

Prerequisites

You must define profile ratings before you can associate them with a color.

To associate ratings with colors:

1. Navigate to **Setup > Customer Management > Customer Profiles**.
2. Select the Preferences tab.

The screenshot shows the 'Customer Profile Setup' window with the 'Preferences' tab selected. The window contains three main sections:

- Module Groups:** A table with columns: Module, Responsibility, Customer Type, Group, and Dashboard Group.

Module	Responsibility	Customer Type	Group	Dashboard Group
Contact Center	Customer Support, Vision Proj	All		Dashboard Group 1
Depot Repair Orders		All	DepotRepair	Dashboard Group 1
Critical Customer Management	Customer Support, Vision Enter	All	new one pg	
Contact Center	Customer Care	All		New dash for 1159-1
Contact Center	Customer Support, Vision Enter	Organization	Services Group	Services Dashboard
Contact Center	Customer Support, Vision Enter	All	new one pg	Dashboard Group 1
- Rating Labels:** A section with a 'Rating' column and a 'Color' column. The 'Rating' column has 'HIGH', 'LOW', and 'MEDIUM' selected. The 'Color' column has three empty color swatches.
- Categories:** A table with columns: Category, Meaning, and Description.

Category	Meaning	Description
ACCOUNTS	Accounts	Accounts related profiles
CATEGORY 619509	CATEGORY	testing123
COLLATERAL	Collateral	Collateral - test for a Demo.
CONTRACTS	Contracts	Contracts related profiles
CUSTOMER INTEL	Customer Intelligence	Customer Intelligence related profiles
INSTALLED BASE	Installed Base	Installed base related profiles

3. In the Rating Labels region, select the rating you wish to associate with a color from the Rating list of values. The Rating field displays the Code value from the lookup, not the value users will see.
4. Select a color to associate to the rating from the Color list of values.
5. Save your work.

4.1.5 Defining Profile Check Categories

Use this procedure to define the categories used in the Dashboard tab to group profile checks. For example, open, escalated, and accepted tasks can all be grouped under the Tasks category.

Prerequisites

None

To define categories:

1. Navigate to **Setup > Customer Management > Customer Profiles**.
2. Select the Preferences tab.
3. In the Categories region of the tab, for each category you wish to define:
 - a. Enter a name for the category in the Category field. This internal name will not display on the Dashboard tab.
 - b. Enter the wording that will display on the Dashboard tab in the Meaning field.
 - c. Optionally enter a description for the category in the Description field.
4. Save your work.

4.1.6 Defining Profile Check Variables

Use this procedure to define the variables you wish to use in your profile checks. The variables contain the SQL statement that is executed to retrieve the customer profile check value. You can use the same variables in multiple profile checks.

Your SQL statements can contain two bind variables:

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

- :cust_account_id - Use this variable if the SQL statement refers to a customer account

No other bind variables are supported.

Your SQL statement must be constructed so that only a single row is returned by the query.

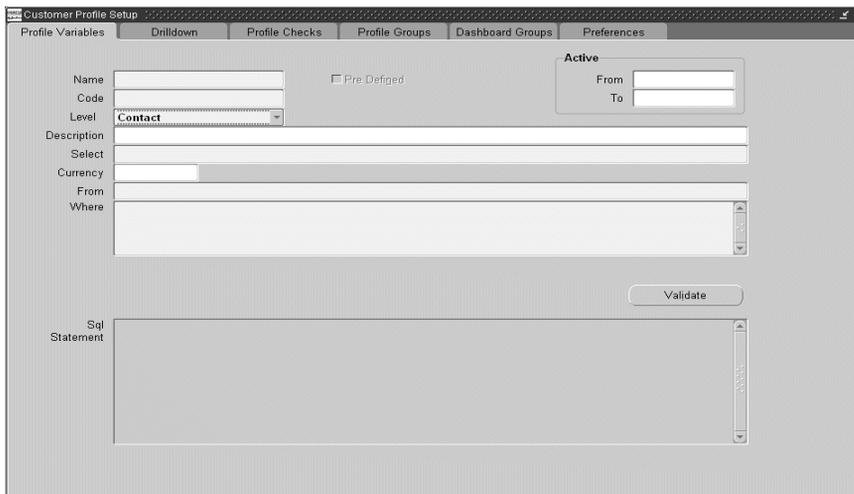
For a detailed description of the database objects you can include in your SQL statement, please refer to the Electronic Technical Reference Manual (eTRM) for Customer Care that is available from <http://metalink.oracle.com>. Navigate to Top Tech Docs and use the link titled Applications Electronic Technical Reference Manuals. Customer Care database objects are stored in the folder named CSC.

Prerequisites

None

To define a profile check variable:

1. Navigate to Setup > Customer Management > Customer Profiles.
The Customer Profile Setup window appears.
2. Select the Profile Variables tab.



The screenshot shows the 'Customer Profile Setup' window with the 'Profile Variables' tab selected. The window has a title bar and several tabs: 'Profile Variables', 'Drilldown', 'Profile Checks', 'Profile Groups', 'Dashboard Groups', and 'Preferences'. The 'Profile Variables' tab is active. The form contains the following fields and controls:

- Name:** A text input field.
- Code:** A text input field.
- Level:** A dropdown menu with 'Contact' selected.
- Description:** A large text area.
- Select:** A text input field.
- Currency:** A text input field.
- From:** A text input field.
- Where:** A text input field with a scroll bar on the right.
- Pre Defined:** A checkbox.
- Active:** A section containing 'From' and 'To' text input fields.
- Validate:** A button.
- Sql Statement:** A large text area with a scroll bar on the right.

3. Click **New** on the toolbar.

4. Enter a name in the Name field.
5. Enter a unique name in the Code field.
6. If you are displaying the information from this variable in the Dashboard tab, then using the Level drop-down list, select the appropriate view where the information is to appear. Available views are: Customer, Account, and Contact. Agents use these views to filter the information in the Dashboard tab.
7. If you wish to restrict the use of this variable, then enter dates in the Active: From and Active: To fields.
8. Optionally enter a description of the profile variable in the Description field.
9. Enter the appropriate components of the SQL statement in the following fields:
 - Select (mandatory field).
 - Currency (optional field).
 - From (mandatory field).
 - Where (mandatory field).
 - Other (optional, used for including clauses such as Group By).
10. To validate the SQL statement, click **Validate**.
11. Save the variable by clicking **Save** in the toolbar.

Your SQL statement is validated automatically when you save. You cannot save an invalid SQL statement.

4.1.7 Defining Drill-Downs for a Profile Check

Use this procedure to define the drill-down windows for a profile check. There are two levels of drill-down windows. The first level lists the items summarized by the profile check. The second-level drill-down window is the application window which displays the details of an individual record. An agent displays an item in the application window by double clicking on one of the fields in the summary list.

Prerequisites

You must create the variables for the profile check before you can define drill-down windows.

Prerequisites

You must define the form object first in the Form Functions window. You can access this window by logging in under the Systems Administrator Responsibility and navigating to Application > Function.

To enable application windows for drill-down:

1. Navigate to Setup > Customer Management > Customer Profiles.

The Customer Profiles window opens.

2. Select the Drilldown tab.

3. Click **New**.

The Task Setup: Object Types window opens.

The screenshot shows the 'Task Setup: Object Types' window. The 'Name' field is 'Contract Drilldown' and the 'Description' is 'Drilldown for Contract Authoring form'. The 'Object Code' is 'CSC_PROF_OKSAUDET', 'Seeded' is checked, and 'From Task' is unchecked. The 'Application' is 'Customer Care'. The 'Launch Details' tab is selected, showing 'Function Name' as 'OKS_OKSAUDET' and 'Parameters' as 'P_CHR_ID = &ID'.

4. Enter a name for the drill-down module object type you are creating in this procedure in the Name field.

Note: The name you enter here is for your reference only. It does not display in the Drilldown Module list of values.

5. Enter a description for the drill-down module in the Description field.

6. Enter a value in the Object Code field that begins with `CSC_PROF`, for example: `CSC_PROF_OKSAUDET`.
7. You must know both the function name and the window name displayed for the user. The function name, for example, `OKS_OKSAUDET`, is what you enter in the Function Name field in this window. You need to know the associated User Function Name: `Author Service Contracts` because this is what gets displayed in the Drilldown Module list of values on the Drilldown tab. Use the following procedure to find either name:
 - a. Switch Responsibility to Systems Administrator.
 - b. Navigate to Application > Function.
The Forms Functions window appears.
 - c. Using the Query by Example method, display the function either using the Function or User Function Name fields.
 - d. Note down the names of both fields.
8. Enter the function name in the Function Name field. For example, `OKS_OKSAUDET`.
The Drill Down Module list of values displays the User Function Name associated with this form function name.
9. Enter the parameters.
10. Select Customer Care from the Application Name list of values.
11. Entry in the Usage region is optional. You can select `CUSTOMER_CARE` from the list of values, which also populates the Object User field. The Seeded check box indicates whether the module is predefined.
12. Save your changes.
13. Close the form to return to the Drilldown tab.
The new application window is available in the Drilldown Module field list of values.

4.1.9 Defining Profile Checks

Use this procedure to define profile checks.

You can use the predefined profile checks as a guide. See Predefined Profile Checks on page 4-21.

Prerequisites

You must define profile variables, ratings, and rating labels first.

To define profile checks:

1. Navigate to Setup > Customer Management > Customer Profiles Setup.
The Customer Profile Setup window appears.
2. Select the Profile Checks tab.

The screenshot shows the 'Customer Profile Setup' window with the 'Profile Checks' tab selected. The window contains several sections for configuring a profile check:

- General Information:** Fields for Name, Code, Level (set to 'Customer'), and Description. There are also 'Active' fields for 'From' and 'To' dates, and a 'Pre Defined' checkbox.
- Configuration:** Fields for Type (set to 'Variable'), Variable, Data Type (set to 'Number'), and Format Mask.
- Rules:** A table with columns for Operator, Group, Variable, Condition, Expression, Variable, and Group.
- Ratings:** A table with columns for Lower, Upper, Label, and Color.
- Threshold:** Radio buttons for 'Upper(Z)' and 'Lower', a 'Label' field, and a 'Color' field.

3. Enter a name for the profile check in the Name field. This is the wording the agents see in the Dashboard tab or Profile window.
4. The Code field defaults to the name you enter in the Name field. You can substitute the value in the Code field with another unique value.
5. Select the level for the profile check depending on what type of information the profile check summarizes. The options are: Customer, Account, or Contact.
6. Enter a description for the profile check in the Description field.
7. Enter the date when the profile check is to be in force by specifying the Active From and Active To fields.

8. If you wish to create a variable profile check, then select **Variable** from the Type drop-down list and follow the steps described in Defining Variable Profile Checks on page 4-19.
9. If you wish to create a Boolean (Yes or No) profile check, then select **Yes or No** from the Type drop-down list and follow the steps described in Defining Boolean Profile Checks on page 4-20.
10. Save your work.

4.1.9.1 Defining Variable Profile Checks

Perform these steps to create a variable profile check after you have completed the basic steps described earlier:

1. In the Variable field, select the variable on which the profile check is to be based. This is one of the variables you have defined in the Profile Variables tab.
2. In the Data Type field, enter the data type for the variable you have selected. The valid choices are Number, Char, and Date.
3. If appropriate, enter a format mask in the Format Mask field.
4. In the Ratings region, define value ranges and their labels. For each range:
 - a. Enter a Lower and Upper number. The range you enter here cannot overlap another range.
 - b. Select an appropriate label. This is one of the rating labels you have created which combine the rating and color code.

Enter the low value for the first range and the high value for the last range as shown in the example below. In the example, leaving the Upper Value for the High range blank ensures that your profile check displays for customers of any high value above 20.

Lower Value	Upper Value	Label
0	10	Low
11	20	Medium
21	Leave blank	High

5. If you wish, you can turn the display of the profile on only when the number is below or above a threshold.

For example, you may wish call center agents to see information on the number of open service requests for a customer regardless if the number is low or high. But managers may care only about customers with high numbers. By specifying the upper number in the Medium range as your trigger, you can display only the high range to the group of your choice. To define a threshold for a profile check:

- a. Select either the Upper or Lower radio button depending on whether you wish to use the lower or higher number for the range as the threshold.
- b. Using the Label list of values, select the range below or above which you wish the display to be triggered.

Using the above example, if you wish to display the profile check only when the value is High, then you would select the Upper radio button and select Medium from the Label list of values.

- c. For the threshold to affect the display of information you must select the Display on Threshold check box when you define profile groups and dashboard groups. See Grouping Profile Checks for Display in Customer Profile Windows on page 4-22 and Grouping Profile Checks for Display in Dashboard on page 4-24 Tabs for more information.

4.1.9.2 Defining Boolean Profile Checks

Perform these steps in addition to the basic steps described earlier to create a Boolean profile check:

1. Using the Type drop-down list, select **Yes or No**.
2. In the Rules region, build a logical expression (rule) comparing an existing profile variable with a constant or an expression.

For example, the seeded Critical Customers profile check evaluates the expression `Open Service Requests > 5`.

3. Save the profile check you have defined.

4.1.10 Predefined Profile Checks

Oracle TeleService provides the following 28 predefined profile checks you can use as a guide to define your own. All but Critical Customer are variable profile checks:

Note: Do not modify seed data. If you want to make modifications, please make a copy and modify your copy.

- Accepted Tasks
- Active Contracts
- Approved Tasks
- Booked Orders
- Cancelled Contracts
- Cancelled Orders
- Cancelled Tasks
- Critical Customer
- Customer Opportunities
- Entered Contracts
- Escalated Defects
- Escalated Service Requests
- Expired Contracts
- Expiring Contracts
- Installed Base Size (11.5.6)
- Loyalty
- On-Hold Contracts
- On-Hold Tasks
- Open Defects
- Open Orders
- Open Service Requests
- Open Tasks
- Profitability
- Rejected Tasks
- Revenue

- Satisfaction
- Terminated Contracts

4.1.11 Grouping Profile Checks for Display in Customer Profile Windows

Use this procedure to group profile checks for display in the customer Profile window. By associating the groups you create here with application modules and responsibilities you can provide different groups of agents with different customer views in the Profile window.

Prerequisites

You must define profile checks before you can define Profile Groups.

To define profile groups:

1. Navigate to Setup > Customer Management > Customer Profiles.
The Customer Profile Setup window appears.
2. Select the Profile Groups tab.

The screenshot shows the 'Customer Profile Setup' window with the 'Profile Groups' tab selected. The 'Name' field contains 'Demo Profile Group', 'Code' is 'DemoProfileGroup', 'Description' is 'This is for Vision Corporation', and 'Customer Type' is 'All'. There is an 'Active' section with 'From' and 'To' fields. Below, the 'Checks' section has two columns: 'Profile Checks' and 'Group Checks'. The 'Profile Checks' list includes 'Accepted Tasks', 'Approved Tasks', 'Booked Orders', 'Cancelled Contracts', 'Cancelled Orders', 'Cancelled Tasks', 'Critical Customers', 'Entered Contracts', 'Escalated Defects', 'Escalated SRs', 'Expired Contracts', and 'Install Base Size'. The 'Group Checks' list includes 'Open Tasks', 'Open Orders', and 'Active Contracts'. Arrows indicate the ability to move items between the lists. A 'Display on Threshold' checkbox is present for each item in the 'Group Checks' list.

3. In the Name field, enter a name for the profile group.
All the profile checks you have defined are displayed in the Checks region.

4. The Code field defaults based on the value you entered in the Name field.
5. In the Description field, optionally enter a description for the profile group you are defining.
6. In the Customer Type field, select the customer type you want to associate with the profile group.

Selecting All, the default, displays the profile group you are creating for both persons (consumers) and Organizations.

If you wish to restrict this profile group for display when agents are handling a specific customer type, then select either Person or Organization.

7. You can enter dates in the Active From and Active To fields to limit the availability of this profile group.
8. In the Checks region:
 - a. Select the appropriate profile check from the Profile Checks column and move it to the Group Checks column. Use the right and left arrow buttons to move the profile checks between the columns. Use the up arrow and down arrow buttons to move the selected group check up or down in the list.
 - b. Leave the Display on Threshold check box unselected, unless:
 - * You have set up your profile check with a threshold.
 - * You wish this profile check to display only when this threshold is crossed.
9. Save the Profile group.

For an explanation of using thresholds, please see Defining Variable Profile Checks on page 4-19 for additional information.

4.1.12 Grouping Profile Checks for Display in Dashboard Tabs

Use this procedure to group profile checks to create different Dashboard tab views for agents by application module and by Responsibility.

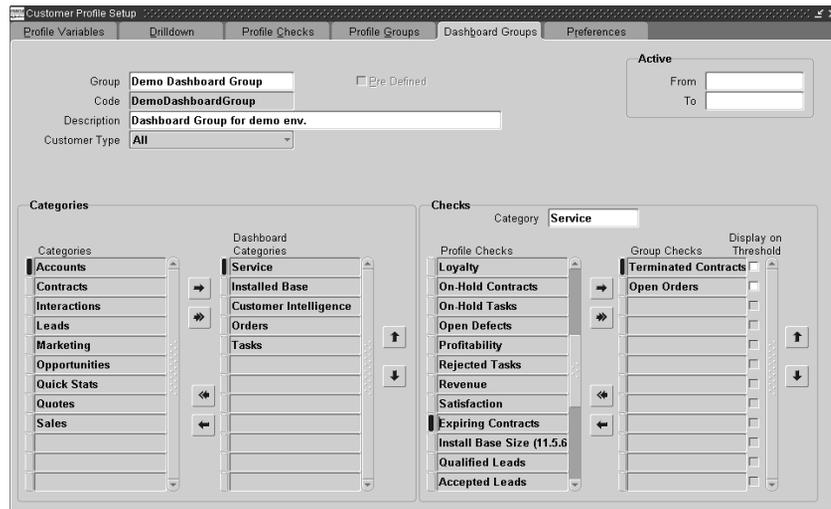
You can use this procedure to create different views for customers, individual accounts, and for customer contacts.

Prerequisites

You must define profile checks and categories before you define dashboard groups.

To define dashboard groups:

1. Navigate to Setup > Customer Management > Customer Profiles
The Customer Profile Setup window appears.
2. Select the Dashboard Groups tab.



3. Enter a name for the Dashboard Group in the Group field.
4. The Code field defaults based on the value you entered in the Group field.
5. Enter a description for the Dashboard Group in the Description field.
6. From the Customer Type drop-down list, select the customer type for this dashboard group.

The default is All, but you can restrict the usage of groups to either Organizations or Persons. Restricting a Dashboard group to a customer type means that the information will display only for customers of that type.

7. Select the level at which you wish to display this group using the Level drop-down list. You can display information on the Dashboard for customers, accounts, and customer contacts.

Each level requires that you to set up different profile checks, so the selection you make here restricts the profile checks you can select for the group.

You can use the dashboard group definitions to determine the display of any one level (such as customers) or for all three levels (such as customers, accounts, and customer contacts). Remember that the categories you set are for the entire dashboard group and are not defined for a specific level. However, the profile checks that display are applicable for the specific level that you choose.

8. If you wish to restrict the use of this dashboard group for a specific time period, then enter dates in the Active From and Active To fields.
9. Select the categories that will organize the information on the Dashboard tab:
 - a. In the Categories region, move the categories from the Categories column to the Dashboard Categories column using the right and left arrow buttons.
 - b. Order the categories in the order you wish them to display in the Dashboard. Use the up-arrow and down-arrow buttons to move a category up or down in the list.
10. Save your changes so your categories are available in the next step.
11. In the Checks region, specify which profile checks you wish to display under each category:
 - a. Select the dashboard category you wish to set up from the Category list of values.
 - b. Select the profile checks you wish to use by moving them from the Profile Checks column to the Group Checks column. Use the right and left arrow buttons to move the profile checks between the columns.
 - c. Determine the display order of the profile checks by ordering those you have selected (the Group Checks column). Use the up-arrow and down-arrow buttons to move the selected profile check up or down in the list.
12. If you have set up a particular profile check with a threshold and wish to restrict the display using that threshold, then select the Display on Threshold check box to the right of the Group Checks column.
13. Save your dashboard group.

4.1.13 Determining Access by Application Module and Responsibility

Use this procedure to determine which application module, customer type, and Responsibility displays the profile groups and dashboard groups you have created.

Prerequisites

You must create the profile and dashboard groups first.

To determine access by modules, customer types, and responsibilities:

1. Navigate to Setup > Customer Management > Customer Profiles.
2. Select the Preferences tab.

The screenshot shows the 'Customer Profile Setup' window with the 'Preferences' tab selected. The window is divided into three main sections:

- Module Groups:** A table with columns for Module, Responsibility, Customer Type, Group, and Dashboard Group.

Module	Responsibility	Customer Type	Group	Dashboard Group
Contact Center	Customer Support, Vision Proj	All		Dashboard Group 1
Depot Repair Orders		All	DepotRepair	Dashboard Group 1
Critical Customer Management	Customer Support, Vision Enter	All	new one pg	
Contact Center	Customer Care	All		New dash for 1159-1
Contact Center	Customer Support, Vision Enter	Organization	Services Group	Services Dashboard
Contact Center	Customer Support, Vision Enter	All	new one pg	Dashboard Group 1
- Rating Labels:** A section with a 'Rating' column and a 'Color' column. The 'Rating' column has three rows: HIGH, LOW, and MEDIUM. The 'Color' column has three corresponding color swatches.
- Categories:** A table with columns for Category, Meaning, and Description.

Category	Meaning	Description
ACCOUNTS	Accounts	Accounts related profiles
CATEGORY 619509	CATEGORY	testing123
COLLATERAL	Collateral	Collateral - test for a Demo.
CONTRACTS	Contracts	Contracts related profiles
CUSTOMER INTEL	Customer Intelligence	Customer Intelligence related profiles
INSTALLED BASE	Installed Base	Installed base related profiles

3. Select an application module from the Module list of values. Although all application modules from all E-Business Suite applications appear in the list of values, you are restricted to enabling access only to those applications that use the Profile window and Dashboard tabs:

For Dashboard Groups which are available in Oracle TeleService and Oracle TeleSales, you must select either:

- Customer Dashboard
 - The Contact Center window in Oracle TeleService
- E-Business Center

The E-Business Center window in Oracle TeleSales.

4. For Customer Profile groups, which are available in Oracle TeleService and Oracle Depot Repair applications, you must select one of the following:
 - Critical Customer Management
The Override Customer Criticality window in Oracle TeleService.
 - Enter Service Request
The Service Request window of Oracle TeleService.
 - Depot Repair Orders
The Repair Order window in Oracle Depot Repair.
5. If you wish to restrict access to the customer information to agents with a particular Responsibility, then select the Responsibility using the Responsibility list of values (LOV).

Leaving this value blank enables agents of all responsibilities to access to customer information.

You can map more than one Responsibility by creating multiple records.
6. Use the Customer Type drop-down list to restrict the type of profile and dashboard groups that appear in the Group and Dashboard Group LOVs:
 - Selecting Organization or Person restricts the selection to the profile and dashboard groups you have set up for that customer type.
 - Selecting All displays all dashboard and profile groups.
7. Select a profile group, a dashboard group, or both you wish to enable using the Group (Profile Group) and Dashboard Group LOVs.
8. Save your work.

4.1.14 Running the Customer Profile Engine

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

If you wish to generate data for the contact-level profiles, then you must set the system profile **Customer Care: Include Contact Profiles in Customer Profile Engine Batch Runs** to **Yes**.

The Customer Profile Engine, when executed, performs the following operations in the sequence below:

- Evaluates the results of all the effective profile variables.
- Evaluates the results of all effective profile checks based on the profile variables.
- Evaluates the results for all the customers, accounts, and contacts.

The Customer Profile Engine must be run to:

- Retrieve profile values for new customers
- Retrieve the latest profile values for all customers
- Reflect changes made to the profile setup
- Retrieve values for new profiles

The Customer Profile Engine can be run in two ways:

- As a concurrent program (for more information on running concurrent programs, refer to the *Oracle System Administrator's Guide*).
- When agents click the Refresh button available in the Profile section or the Dashboard tab of the Contact Center or the E-Business Center in Oracle TeleSales. This manual method fetches the latest data for the displayed customer.

The parameters for running Customer Profile Engine are:

- Party Name
- Group Name

4.1.15 Setting Automatic Refresh of Profiles on the Dashboard

You can have the application automatically recalculate the customer profile values for a customer whenever the agent displays a customer record by setting the profile option **Customer Care: Permit the Dashboard to be Refreshed Automatically** to **Yes**. If the profile option is set to **No**, the profile values are updated only when the agent clicks the Refresh button. Use this procedure to set the profile option.

To enable or disable the automatic refresh of customer profiles:

1. Navigate to Others > Profile System Values
2. Using the Query by Example method, display Customer Care: Permit the Dashboard to be Refreshed Automatically.
3. Set the profile to Yes to enable the functionality. Setting the value No disables the automatic refresh.
4. Set the system profile Customer Care: Run the Profile Engine to process the profile checks for contacts at batch mode to Yes to enable the engine to calculate contact-specific profile checks.

4.2 Setting Up Relationship Plans

Relationship plans make it possible for your organization to deliver personalized and proactive customer service by alerting agents to customer needs. Whenever an agent is working on a customer record that meets the conditions you specify, the application can automatically display an alert message or launch a script that guides the agent through the interaction with the customer.

Relationship plans can trigger the alerts and scripts for agents working in the Contact Center and Service Request windows in Oracle TeleService and in the E-Business Center window for Oracle TeleSales.

For a general understanding of relationship plans see the following topics:

- The About Relationship Plans on page 4-31 topic gives you a general overview of the relationship plan concepts.
- The Relationship Plans Components on page 4-32 section describes some of the modules you must set up to create relationship plans.
- The Process on page 4-34 Overview gives you an overview of the major setup steps in the order you must carry them out. You can access the detailed instructions from each step.

The following topics give you the details for individual implementation steps. They include:

- Defining Plan Groups on page 4-35
- Defining an Action on page 4-36
- Setting Up Messages and Scripts for Association with Relationship Plans on page 4-39

- Defining Messages on page 4-40
- Generating Messages on page 4-42
- Creating the Relationship Plan Itself on page 4-43
- Creating a Condition for the Relationship Plan on page 4-46
- Adding or Modifying Relationship Plan Condition Lines on page 4-49
- Enabling Relationship Plans on page 4-50
- Running the Relationship Plan Assignment Engine on page 4-51
- Modifying Relationship Plan Lookups on page 4-52

4.2.1 About Relationship Plans

A relationship plan is a process which runs in the background periodically checking which customers meet one or more conditions you specify. Here are two examples:

- Plan A

If a customer contract is to expire in five days, then alert the agent with a message.

- Plan B

If a customer has ten or more open high-priority service requests, then check if the customer has orders of \$1 million or more.

For customers with orders above \$1 million, launch a script that guides the agent in handling the customer call.

For customers below that threshold, alert the agent with a message.

Determining what action to take is a two-step process. The relationship plan first evaluates if a customer qualifies for the plan and then determines what action to take.

If your plan includes only one condition, then all customers that meet that condition qualify for the plan and the plan takes the action you specify. For Plan A, that means alerting agents for all the qualifying customers.

But a plan can take different actions for different subsets of the customers who qualify. Plan B first decides which customers qualify for the plan by checking which have ten or more high-priority open service requests.

The plan evaluates the qualifying customers using two more conditions and takes different actions for those customers who meet them:

- If a customer has orders of less than \$1 million, the plan displays an alert.
- If a customer has orders of more than \$1 million, the plan displays a script.

4.2.2 Relationship Plan Components

Relationship plan implementation involves many steps in multiple modules. You must create a mechanism to decide which customers belong to your plan, for example, and you must also create the actions, the messages, and the scripts, you wish the plan to display. The relationship plan itself (Setup > Relationship Plans > Define Relationship Plans) brings all the pieces together.

This section highlights the different types of setups you need to complete. A later section gives a process overview of the actual setup steps themselves.

Monitoring the Database of Customers

If you wish to assign your customers to relationship plans automatically, you must set up a way to monitor the database to see if any customers qualify. For Plan A this means finding customers with expiring contracts. For Plan B, finding customers with high-priority service requests.

This involves setting up a Profile Check which retrieves and summarizes customer data based on the SQL query you enter. The Customer Profile Engine concurrent program refreshes this data at the periods you specify. See Setting up Customer Profiles on page 4-2.

Evaluating if Customers Qualify for the Plan

Now that you are collecting data on your customers, you must create the condition which evaluates the data tracked by the profile check and determines whether a specific customer qualifies for the relationship plan. Does the customer have more than one open high-priority service request? Does the customer have more than five expiring service contracts?

You enter the qualifying condition in the Relationship Plan itself. It is evaluated by the concurrent program Relationship Plan Assignment Engine. If any customers meet the condition, then they qualify for the plan.

Setting Up the Actions the Plan will Take

A relationship plan can take different actions on subsets of the qualifying customers. Now that you have assigned customers to the plan, you are ready to determine what actions you wish the plan to take for which customers.

You must define the actions and conditions separately.

For Plan B, this means creating two conditions:

- Condition B1: If a customer has orders of less than \$1 million
- Condition B2: If a customer has orders of more than \$1 million

And two actions:

- Action B1: Display alert.
- Action B2: Display Script

Plan A does not need to evaluate any additional condition because it displays an alert for all customers who qualify, however, you must still create one because conditions are the only way to trigger an action:

- Condition A1: <header information only>

You must also create the action for Plan A:

- Action A1: Display alert message that contract is about to expire.

Please note that the action setup uses a user interface provided by Oracle Contracts which includes additional functionality you do not need to use for relationship plans.

Setting Up the Messages or Scripts

You must also set up the alert messages and scripts you wish to display for the different actions your plan will take.

You set up the Messages in the Messages window under the Application Developer Responsibility and compile them by running the Generate Messages concurrent program. Messages are similar to the standard application messages used by all Oracle applications and are fully described in the *Oracle Applications Developer's Guide*.

You must create your scripts using Oracle Scripting as described in that applications documentation.

Hooking Up the Conditions to the Actions

When you create the conditions of your relationship plan, you cannot directly specify the alert messages and scripts the conditions are to launch. You must make this link indirectly by first defining an "Outcome" for each script and message. To create an Outcome, you define the script or message as a Process Definition of the

type Outcome and then use the name of this process definition to create the link with the condition that will trigger it.

4.2.3 Process Overview

Here is an outline of the steps required to implement Relationship plans:

1. Log into Oracle applications under the Customer Support Responsibility.
2. Set up a profile check that retrieve and summarize your customer data. You can use one of the profile checks you set up to display key customer information for agents as part of Customer Profile setup. If you do need to create a profile check specifically for relationship plans, then you must complete at least the following steps:
 - a. Navigate to Setup > Customer Management > Customer Profiles.
 - b. On the Profile Variables tab, define the variable you wish to use in your profile check. This is where you enter the SQL queries. You can use the same variable in multiple profile checks. See Defining Profile Check Variables on page 4-11.
 - c. On the Profile Checks tab, define the profile check itself. See Defining Profile Checks on page 4-17.
3. Navigate to Setup > Relationship Plans > Events > Define Action and set up one action for every condition in the relationship plan. Every relationship plan must have at least one action. On the Basic tab, you must define all of the variables you want to use for your condition and every token that you wish to use in an alert message. See Defining an Actions on page 4-36 for details.
4. If you wish to have your relationship plan display an alert message, then you must:
 - a. Under the Application Developer Responsibility, navigate to Application> Messages.
 - b. Define all of your messages as described in Defining Messages on page 4-40. For displaying customer information, such as the customer name, in the text of the message you are limited to using only the tokens you have defined in the Action window in the previous step.
 - c. Generate the messages (Other > Requests > Run) by running the Generate Messages concurrent program. See Generating Messages on page 4-42.

5. If you wish to have your relationship plan display a script, then prepare the script as described in Oracle Scripting documentation and note down its name. You can obtain this from the Name field of the Script Properties window in the script author's file.
6. You have now created the action(s) your relationship plan will take, but you cannot hook them up to the relationship plan just yet. You must first create an intermediary called a Process Definition of type Outcome. It is this process definition or "Outcome" and not the action itself that you associate with the relationship plan conditions that launch them.

To create the outcome:

- a. Switch to the Customer Support Responsibility and navigate to Setup > Relationship Plans > Events > Define Process Definition.
 - b. Create the outcomes according to the steps outlined in Setting Up Messages and Scripts for Association with Relationship Plans on page 4-39.
7. If you wish to organize your relationship plans in categories, then navigate to Setup > Relationship Plans > Define Plan Groups and define these categories as described in Defining Plan Groups on page 4-35.
 8. You are now ready to create the relationship plan itself which ties together all of the setups you have done so far. In this step you enter both the condition that determines which customers qualify for the plan and any other conditions which decide what action the plan will take. The setup is done in the New Plan window (Setup > Relationship Plans > Define Relationship Plans). See Creating the Relationship Plan Itself on page 4-43 and Creating a Condition for the Relationship on page 4-46 Plan for details.
 9. Now you must enable your plan for any of the forms where you wish the actions to appear. Navigate to Setup > Relationship Plans > Enable Relationship Plans) and enable the forms as described in Enabling Relationship Plans on page 4-50. The options are: Contact Center, Service Request, and the E-Business Center from Oracle TeleSales. See.
 10. As a last step, run the concurrent program Relationship Plan Assignment Engine to assign customers to your plan. See Running the Relationship Plan Assignment Engine on page 4-51.

4.2.4 Defining Plan Groups

Use this procedure if you wish to create categories to organize your relationship plans into logical groups. Defining plan groups is optional.

Prerequisites

None

To define relationship plan groups:

1. Navigate to Setup > Relationship Plans > Define Plan Groups.

The Relationship Plans Group Lookup window appears.

Code	Meaning	Description	Tag	From	To	Enabled
TEST	Test	Test of the plan group		28-APR-2003		<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

2. In a new row, enter a value in the Code field.
3. Enter a value in the Meaning field.
4. Enter a value in the Description.
5. The Tag field is not used in Oracle TeleService.
6. Optionally enter dates in the From and To fields.
7. Save your plan group.

4.2.5 Defining an Action

Use this procedure to define the action the application will take when the relationship plan applies to a particular customer.

If you wish to display an alert message for agents as your action, then you must define any tokens you wish to use in the message text in the Element Name field of the Basic tab. For example, if you wish to include the customer's name in the alert message, then you must enter `CUST_PARTY_NAME`.

Note: You must enter the same token name when you set up condition that will trigger this action. See *Creating a Condition for the Relationship Plan* on page 4-46.

If the action you are defining is triggered by evaluating a relationship plan condition, then you must also define the variable you will use for the condition. If your relationship plan contains a condition that will take this action based on the city where the customer is located, then in the Basic tab you must enter the variable `CITY`.

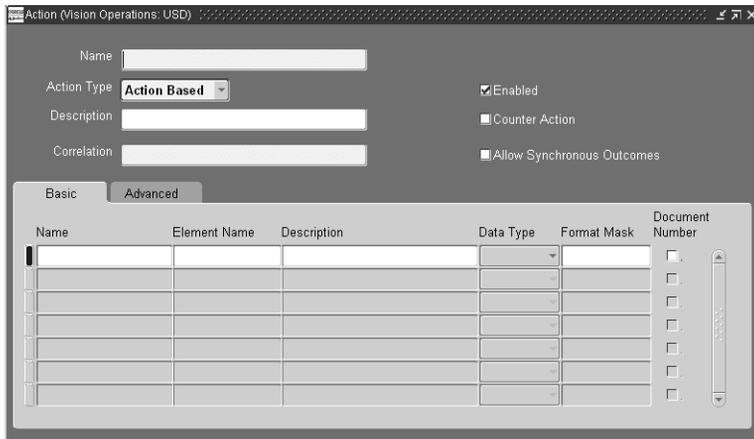
If you wish to view the available list of variables/tokens to choose from, you can query up the action with the name `Customer Care - Generic Action` or refer to Appendix C, "Seed Data for Relationship Plans" of this guide.

Prerequisites

None

To define an action:

1. Navigate to Setup > Relationship Plans > Events > Define Action.
The Action window appears.



2. Enter a name for your action in the Name field.
3. Select **Action Based** from the Action Type drop-down list. Date Based is not supported.
4. Optionally enter a description of your action in the Description field.
5. Enter a unique name in the Correlation field. You can start the name with the prefix CSC_, for example, to indicate your action is related to Oracle Customer Care.
6. Select the Enabled check box to make this action available for use.
7. Select the Allow Synchronous Outcomes check box to allow a real-time alert or script to pop up.
8. If your action displays an alert message, then in the Basic tab, enter any tokens you wish to use in your message:

Note: You need not define any tokens for generic messages that apply to all customers.

- a. In Element Name, enter a valid variable name.

You can obtain the list of valid Contact Center header variable names by querying up the Customer Care - Generic Action or from Appendix B of this guide.

For example, if you wish to display the full name of the customer in the alert message, then enter `CUST_PARTY_NAME`.

You must also enter the same value in two other places: in the text of the message when you define the message in the Messages window and in the Parameters window when defining the condition that uses this action.

- b. You can enter the same value in the Name field as in the Element Name field.
 - c. Optionally, enter a description in the Description field.
 - d. Select a data type of CHAR, NUMBER, or DATE in the Data Type field.
 - e. Select a format mask, if appropriate.
9. If your action is triggered by a condition that evaluates a variable, then define the variable in the Basic tab in the same manner as the message tokens above.
 10. Save your action.

4.2.6 Setting Up Messages and Scripts for Association with Relationship Plans

You can indicate which script or message your relationship plan is suppose to launch only indirectly by first creating what is called a Process Definition of type Outcome. It is the name of this process definition, or outcome, rather than the name of the message or script itself, that you will associate with the condition of your relationship plan.

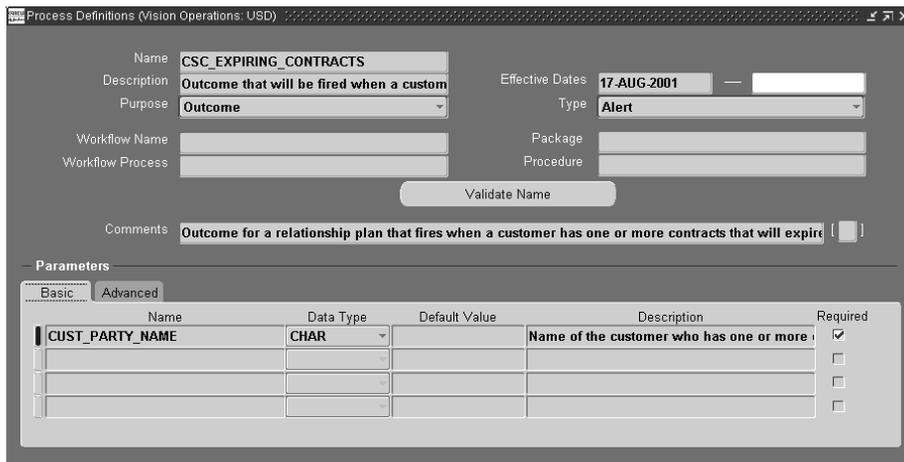
Prerequisites

- You must create the action, message, and script first.
- For Scripts, you must know the name of the script. You can obtain this from the Name field of the Script Properties window. You can open this window from the script author's file.
- For messages, you must know:
 - The value you entered in the Name field of the Messages window.
 - The value(s) you entered for the individual message tokens used by the message. (These were entered on the Basic tab of the Action window in the Element Name fields.)

To define process definitions of type outcome:

1. Navigate to Setup > Relationship Plans > Events > Define Process Definitions.

The Process Definitions window opens.



2. In the Name field, enter the name of the script or message.
3. Optionally enter a description in the Description field.
4. Select **Outcome** from the Purpose drop-down list. This is the only permitted value.
5. From the Type drop-down box, select either Alert or Script. The other types are not supported.
6. Optionally enter comments in the Comments field.
7. If you are creating the outcome for a message, then in the Name fields of the Basic tab of the Parameters region, enter the same values you entered for Element Name fields on the Basic tab of the Action window.
8. The Data Type field defaults to the data type of the Element Name.
9. Save your process definition.

4.2.7 Defining Messages

Use this procedure to define the alert messages the agents will see. Messages are defined for use in displaying messages about customers in real-time alerts.

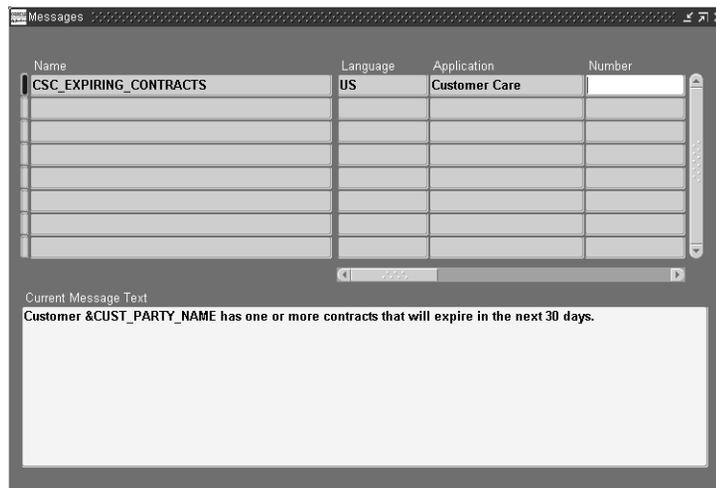
Prerequisites

None

To define messages:

1. Under the Application Developer Responsibility, navigate to Application > Messages.

The Messages window opens.



2. Enter a name for your message in the Name field. You must enter this same name when you create a Process Definition.
 3. Select a language from the Language list of values (LOV).
 4. Select Customer Care from the Application LOV.
- Entry in the remaining fields, Number, Type, Maximum Length and Description, are optional.
5. In the Current Message Text field, enter the message that you wish to display as a real-time alert.

If you wish to display the value of a token, for example, the customer name CUST_PARTY_NAME, then you must enter it preceded with an ampersand symbol, for example, &CUST_PARTY_NAME.

You are restricted to using only the tokens that you have entered in the Element Name fields in the Action window. See Defining an Actions on page 4-36.

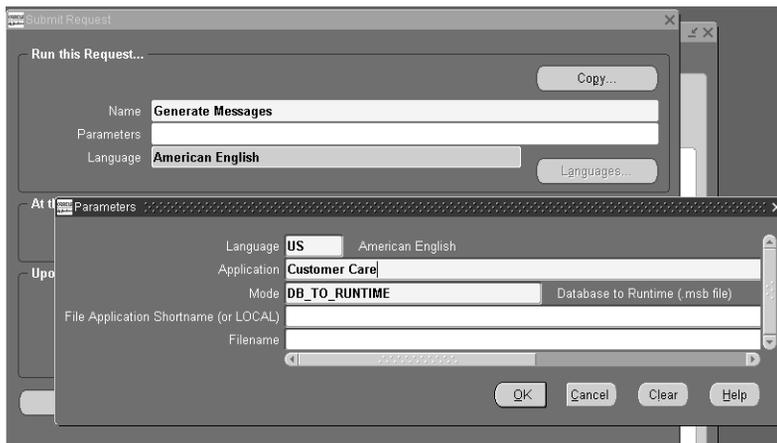
6. Save your message.

4.2.8 Generating Messages

Use this procedure to generate the messages you have created.

To generate messages:

1. Under the Application Developer Responsibility, navigate to Other > Requests > Run.
2. Select the Single Request radio button in the Submit a New Request window and click OK.
3. Select Generate Messages from the Name list of values.
4. In the Parameters window enter:
 - Language: US or another message language
 - Application: Customer Care
 - Mode: DB_TO_RUNTIME



5. Click **OK** to close the Parameters window.
6. Click **Submit**.

7. Click **No** to submit another request.
8. You can view the status of your requests by navigating to View > Requests > All My Requests > Find

4.2.9 Creating the Relationship Plan Itself

Use this procedure to create the plan which ties all of the pieces of the relationship plan together. It is here you enter the condition that determines whether customers qualify for the plan and also the conditions that decide which action the plan will take.

Oracle TeleService provides a predefined relationship plan, Expiring Contracts, which displays an alert when a customer has any contracts that will expire in the next 30 calendar days. This relationship plan uses the profile check called Expiring Contracts. Refer to Appendix B for more details about the predefined relationship plan.

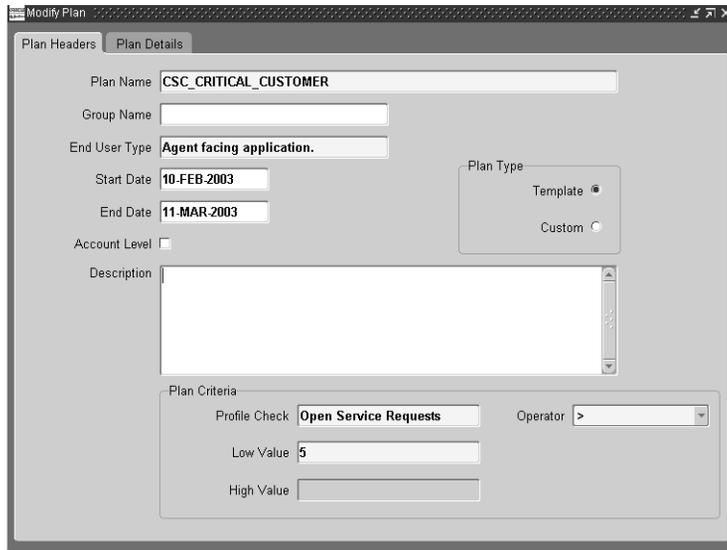
Prerequisites

You must have defined your actions, process definitions, messages, and scripts.

To define the plan itself:

1. Navigate to Setup > Relationship Plans > Define Relationship Plans.

New Plan window appears. (When you are modifying the plan the name of this window changes to Modify Plan, but the functionality is the same.)



The screenshot shows a 'Modify Plan' dialog box with two tabs: 'Plan Headers' and 'Plan Details'. The 'Plan Details' tab is active. The form contains the following fields and controls:

- Plan Name: CSC_CRITICAL_CUSTOMER
- Group Name: (empty)
- End User Type: Agent facing application.
- Start Date: 10-FEB-2003
- End Date: 11-MAR-2003
- Account Level:
- Description: (empty text area)
- Plan Type: Template Custom
- Plan Criteria:
 - Profile Check: Open Service Requests
 - Operator: >
 - Low Value: 5
 - High Value: (empty)

2. In the Plan Headers tab, enter a name for the plan in the Name field.
3. If you wish to group this relationship using relationship plan categories you have created, then select a group name from the Group Name list of values.
4. Optionally enter start and end dates for this relationship plan.
5. Unless you wish to create a plan for individual accounts rather than for customers, leave the Account Level check box unselected. An account relationship plan tracks customers who generate a significant amount of revenue in one account, for example.
6. All relationship plans are initially created from a template, so the Template radio button is selected by default in the Plan Type section. The Custom radio button can be used only from the Inquiry tab when you customize a relationship plan for one specific customer.
7. Enter a description of the Relationship Plan in the Description field.
 - a. In the Plan Criteria section, you define the criteria to be used by the Relationship Plan Assignment Engine to decide which customers qualify for the plan:
 - b. Using the Profile Check list of values, select the profile check that summarizes the customer information you wish to evaluate. The profile

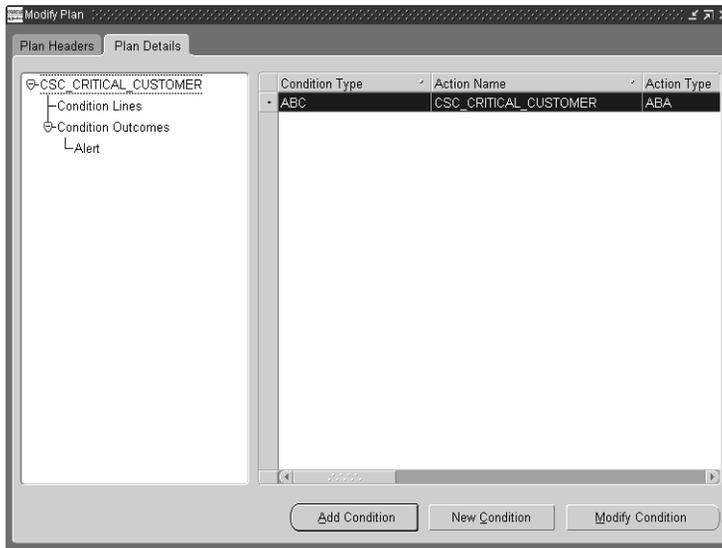
checks contain those seeded with the application as well as those you have defined.

- c. Select an operator from the Operator list of values. The choices are =, <, >, >=, <=, Between, and Not Between.
 - d. Enter the constant in the Low Value field.
 - e. The high value is available only if you previously selected an operator value of Between or Not Between.
8. Save your relationship plan.

You are now ready to specify the action(s) the relationship plan is to take and any additional conditions will trigger them.

Note: If you wish the relationship plan to display an alert message or script to agents for all customers who qualify, you must still create a new condition for each action you wish the plan to take. Conditions provide the only way to specify which actions the plan will take. If you wish all qualifying customers to trigger the action, you simply leave the expression tab blank.

9. Select the Plan Details tab.



10. Click **New Condition** to create a new condition that will trigger one of the action as described in Creating a Condition for the Relationship Plan on page 4-46.

4.2.10 Creating a Condition for the Relationship Plan

Use this procedure to create a condition for your relationship plan. Each relationship plan must have at least one condition attached to it.

Prerequisites

You must create the relationship plan itself before adding conditions.

To create a condition for a relationship plan:

1. Navigate to Setup > Relationship Plans > Define Relationship Plans.
2. Display the relationship plan where you wish to create a condition.
3. Select the Plan Details tab.
4. Click **New Condition**

The Condition window appears.

Condition (Vision Operations: USD)

Name: **CSC_CRITICAL_CUSTOMER** Effective Dates: **02-JAN-2003**

Description: [] Comments: []

Condition Type

Action Date Number of days: []

CSC_CRITICAL_CUSTOMER Before/After: []

Evaluate Once Only Date: []

Expression Function

Seq #	(Left Value	Operator	Right Value)	And/Or
10	([]	[]	[])	[]

Last Occurrence: **11-MAR-2003** Occurrence Details: [] Condition Valid: Show Condition: []

Outcomes Notifications

Outcomes	Enabled	Comments
CSC_CRITICAL_CUSTOMER	<input checked="" type="checkbox"/>	[]
	<input type="checkbox"/>	[]
	<input type="checkbox"/>	[]

Parameters: []

Create Task Task Owner: [] []

5. Enter a name for the condition in the Name field.
6. Optionally enter effective dates, description and comments for your condition.
7. In the Condition Type region, select the Action radio button. The Date condition type is not supported in relationship plans.
8. Select an action from the Action list of values. The list of values contains actions that you previously defined. You must use a unique action for every relationship plan.
9. Leave the Evaluate Only Once check box unselected unless you wish to evaluate your condition only once.

10. In the Outcomes region, use the Outcomes LOV to select the outcome which represents the message or script you wish to display for customers matching this condition.

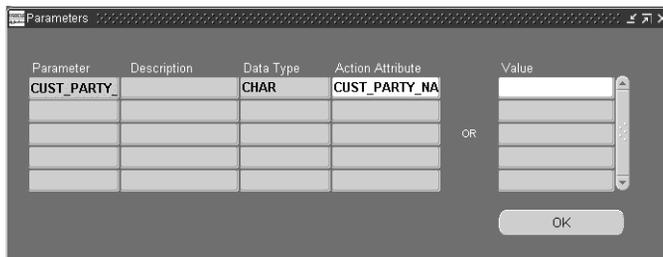
A relationship plan can display a message, a script, or both.

Outcomes, are the intermediaries which permit you to associate scripts and messages with relationship plans. They are defined in the Process Definitions window as described in Registering Messages and Scripts for Use in Relationship Plans on page 4-39.

11. If the outcome is a message which displays the value of one or more tokens, such as the customer’s name, then you must re-enter the same message tokens:
 - a. Click **Parameters**.
 - b. The Parameters window appears.

Note: If you have defined more than one outcome for this condition, then the application displays a different window. In this case you must first:

- Select the parameter you wish to define.
 - Right-click and select **Populate selected rows in PARAMETERS** from the pop-up menu.
-
-



- c. Select the token from the Action Attribute list of values.

For example, if you are displaying the customer name in the body of the message then you must select CUST_PARTY_NAME in the Action Attribute.

Note: Most of the time you will want the value in the Parameter and Action Attributes fields will be the same. But you are permitted to assign different values to the token in your message provided they are of the same data type. For example, if you wish to display the customer name in the message, then you can map the full customer name, the first name, or the last name to that token using this window.

- d. Click **OK** to return to the Conditions window.
12. If you wish to enter a condition which will trigger the action, then enter it in the Expression tab. You can use the parameters you have just mapped.
13. Save the condition.

4.2.11 Adding or Modifying Relationship Plan Conditions

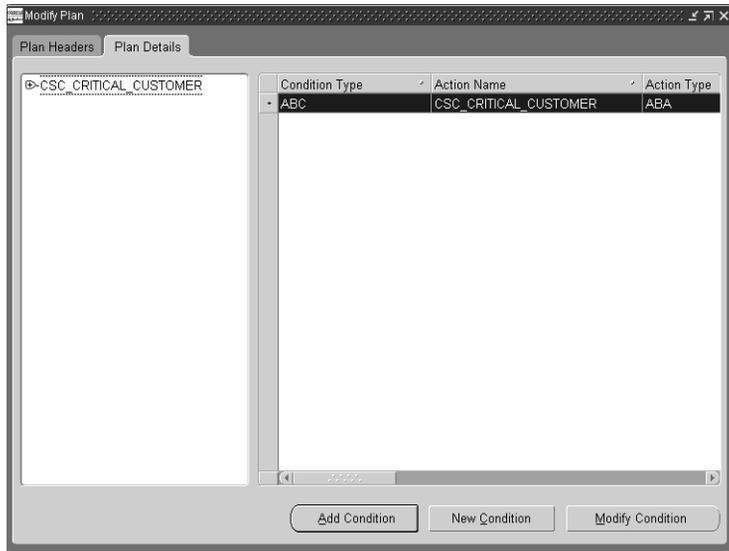
Use this procedure to modify relationship plan conditions. You can add additional conditions to an existing plan or modify a condition already attached to your plan.

Prerequisites

You must define a relationship plan first.

To add or modify relationship plan conditions:

1. Navigate to Setup > Relationship Plans > Define Relationship Plans.
2. Display the Relationship Plan to which you want to add condition lines.
3. Select the Plan Details tab in the Modify Plan window.



4. Click **Add Condition**.
5. Select a condition and click **OK** to attach it to the plan header.
6. If you wish to modify a condition line of a relationship plan, then:
 - a. Click **Modify Condition** in the Plan Details window.
 - b. Make the necessary changes to the condition line or outcome.
 - c. Save the modified condition line.

4.2.12 Enabling Relationship Plans in Application Modules

Follow this procedure to enable relationship plans in different application modules: in the Contact Center and the Service Request windows of Oracle TeleService and in the E-Business Center of Oracle TeleSales.

Prerequisites

None

To enable relationship plans:

1. Navigate to Setup > Relationship Plans > Enable Relationship Plans.

The Enable Relationship Plans - Setup window appears.



2. The Function list of values displays all forms, but you must select one of the three following forms:
 - CSCCCRC for Contact Center
 - CSXSRI SR for Service Request
 - AST_RC_ALL for E-Business Center
3. Save your settings.

Note: Please see the appendix, Enabling Relationship Plans, for additional information.

4.2.13 Running the Relationship Plan Assignment Engine

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

This concurrent program also runs automatically each time you run the Customer Profile Engine.

The Relationship Plan Assignment Engine performs the following operations:

- Evaluates all customers that meet relationship plan criteria and associates the customers with the appropriate relationship plan.
- Evaluates all customer that do not meet relationship plan criteria and disassociates the customer from the relationship plan.
- Checks for all customers who have been manually assigned to relationship plans and ignores automatic association/ disassociation rules for these customers.

The following parameters are available for running the Relationship Plan Assignment Engine:

- Plan Name
- Check Name
- Party Name
- Account Name

Each parameter provides a list of values from which to choose. If a value is entered in the Party Name parameter, the Account Name list of values contains only those values for the selected Party Name. If no Party Name is selected, the Account Name list of values displays all accounts.

You can initiate the Relationship Plan Assignment Engine in two ways:

- Run the concurrent program explicitly.
- Let it run automatically whenever the customer profiles are updated by the Customer Profile Engine.

Customer profiles can be updated by running the Customer Profile Engine as a concurrent program or by selecting the Refresh on the Dashboard tab.

4.2.14 Modifying Relationship Plan Lookups

The lookups described in this section make it possible for you to modify different lists of values for relationship plan setup.

- Group Names for relationship plans

You can modify any of the meaning fields in the lookup described in the following table. It controls the list of values for the Group Name field.

Lookup Type	Meaning	Lookup Code	Meaning	Level
CSC_PLAN_GROUP	Relationship Plans Group	<ul style="list-style-type: none"> ▪ GROUP1 ▪ GROUP2 ▪ GROUP3 	<ul style="list-style-type: none"> ▪ Plan Group1 ▪ Plan Group2 ▪ Plan Group3 	User

- Group Names for relationship plans

You can modify any of the meaning fields in the lookup described in the following table. It controls the list of values for the Group Name field.

Lookup Type	Meaning	Lookup Code	Meaning	Level
CSC_PLAN_STATUS	Relationship Plans Status	<ul style="list-style-type: none"> ▪ APPLIED ▪ DISABLED ▪ ENABLED ▪ MERGED ▪ REMOVED ▪ TRANSFERED 	<ul style="list-style-type: none"> ▪ Applied ▪ Disabled ▪ Enabled ▪ Merged ▪ Removed ▪ Transferred 	User

4.3 Setting Up Critical Customers

The application automatically flags a customer as critical whenever a customer meets conditions defined in a customer profile.

The predefined customer profile, called Critical Customer, flags a customer as critical if the customer has more than five open service requests.

You can change the criteria by modifying the profile or by creating a new one altogether as described in the Setting Up Customer Profiles section. You must select any new profile to be used for criticality checking in the system profile Customer Care: Profile Check for Determining Customer Criticality.

You can manually reset the criticality of a customer making a non-critical customer critical or vice versa and you can view the audit history of such manual over-rides.

4.4 Setting Up Quick Menu

Quick menu is based on seeded filters. Filters have a many to many relationship with AOL functions and are seeded in the Quick Menu tables. This section defines the association of the filter with its function in AOL.

For the Customer Support Responsibility, the Quick Menu has already been setup. To familiarize yourself with the quick menu setup, perform the following steps:

- Viewing System Profile Values
- Verifying AOL Menu for Quick Menu
- Configure the Quick Menu to meet your needs

4.4.1 Viewing System Profile Values

To view the profile values:

1. Open the System Profile Values window from the navigator.
2. Query on the system profile Customer Care: Start Menu in Quick Menu.
3. The default value is Quick Menu for Customer Support.

4.4.2 Verifying AOL Menu for Quick Menu

To verify an AOL menu for quick menu:

1. Using the Application Developer Responsibility, navigate to Application > Menu.

The Menus window appears.

2. Run a query to open the seeded menu CSX_CUSTOMER_SUPPORT_QM.
3. View the results of the query.
4. Close the window.

4.4.3 Configuring the Quick Menu

You can configure a different quick menu for each Responsibility by adding or deleting Quick-Menu-enabled forms.

The seeded quick menu displays all quick-menu enabled forms:

- Manage Critical Customer
- Maintain Relationship Plans
- Order Capture (Order Quoting - Forms)
- View Customer Product

- Maintain Systems
- Contact Center
- Service Request
- Depot Repair

The following item is not quick-menu enabled as it uses the HTML interface:

- Search Knowledge Base

You can add any additional form function to the Quick Menu, even though the form function is not quick menu enabled. This allows you to quickly navigate to the form, but the variables in the original form are not passed to the form on the quick menu. Only quick menu enabled forms can accept variables from the original form.

4.5 Setting Up Wrap-up

Agents record their interactions with customers using the Call Wrap Up window. You can use this procedure to make the wrap up mandatory or optional and specify what information is recorded by default.

Prerequisites

Every interaction between an agent and a customer and each action an agent takes can have multiple outcomes, each outcome can have multiple results, and each result can have multiple reasons.

You must set up the outcome, results, and reasons and their possible combinations by following the procedures described in the *Oracle Customer Interaction History Implementation Guide*.

To set up wrap up:

1. Navigate to Others > Profile System Values.
2. If you wish to make wrap up mandatory for every agent interaction with the customer in the Contact Center, then set the system profile Customer Care: Make Call Wrap Up Mandatory in Contact Center to **Yes**. By default wrap up is optional and this profile is set to **No**.
3. If you wish to make wrap up mandatory for agent interactions in the Service Request window, then set Service: Make Call Wrap Up Mandatory in Service Request to **Yes**. A setting of **No**, makes entry optional.

4. Set the system profile Default Interaction Wrap-Up Combination for Contact Center to the combination of outcome, result, and reason codes you wish to use by default for interactions.

The list of values lists all of the Wrap Up combinations of outcome, result, and reason codes you have created. See the Wrap Up section of the *Oracle Customer Interaction History Implementation Guide*.

5. Set the system profile Customer Care: Default Value for Wrap-Up Activities to the combination of outcome, result, and reason codes you wish to use by default for each activity recorded by the agent.

4.6 Setting Up Party and Account Numbering

Party numbers and account numbers can be generated manually or automatically.

To setup party and account numbering:

1. Set up automatic account numbering:
 - a. Select an Oracle Receivables Responsibility and navigate to System > System Options.
The System Options window appears.
 - b. Open the Trans and Customers tab.
 - c. Check the Automatic Customer Numbering check box if you want to generate customer account numbers automatically in Customer Care.

Note: Although this number is referred to as Customer Number in Oracle Receivables, this number is referred to as Account Number in Oracle TeleService.

2. To enable automatic party number generation in Oracle TeleService, set the HZ: Generate Party Number system profile option to Yes.

4.7 Specify Global Address Formatting and Address Validation

Agents can enter customer addresses in the formats appropriate for the country where the customer is located. For example, if a customer has a branch in Germany, agents enter the address in a format recommended by the Bundespost. For

addresses in the United Kingdom, they enter the address in the format recommended by the Royal Mail.

There are six preset address formats that are available for your use:

- Japan
- Northern Europe
- South America
- Southern Europe
- UK/Africa/Australia
- United States of America

The different address formats are implemented in the application by using descriptive flexfields. Agents enter the country using a list of values and then enter the rest of the address in a flexfield window.

Prerequisites

Understanding of descriptive flexfields

To set up global address formatting and address validation:

1. Set up flexible addresses and address validation as described in the Flexible Address and the Address Validation sections of the Customers chapter of the *Oracle Receivables User Guide*.
2. Set up the two following profile options:
 - Customer Care: Default Country for Contact Center
This profile option defaults the country in the Country field of an address on the Contact Center. The setting of this profile option is mandatory as there is no seeded default value.
 - Customer Care: Default Address Style for Contact Center
If there is no address style associated with the country, then the application uses the address style specified in this profile. By default this system profile is set to AS_DEFAULT (the Oracle Sales Default Address Style).
3. If you wish to create additional address styles then follow the instructions outlined in Setting Up Additional Address Styles on page 4-57.
4. Map the countries to address styles as described in Mapping Countries to Address Styles on page 4-60.

- Set up the Customer Care: Default Address Style for Contact Center system profile option to the address style you wish to use in case a user fails to enter a country for an address.

4.7.1 Setting Up Additional Address Styles

Use this procedure to create additional address styles or to modify existing ones.

Prerequisites

Familiarity with descriptive flexfields.

To set up additional address styles:

- Log into Oracle applications under the Application Developer Responsibility.
- Navigate to Flexfield > Descriptive > Segments.

The Descriptive Flexfield Segments window appears.

- Search for Address in the Title field using the Query Enter / Query Run search method available from the View menu.

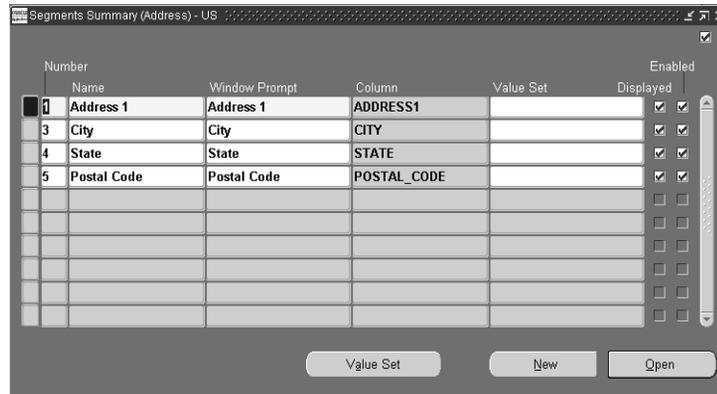
The Descriptive Flexfield Segments window lists the available address styles.

Code	Name	Description	Enabled
Global Data Elements	Global Data Elements	Global Data Element Context	<input checked="" type="checkbox"/>
AS_DEFAULT	AS_DEFAULT	Oracle Sales Default Address Style	<input checked="" type="checkbox"/>
JP	JP	Japanese Address Style	<input checked="" type="checkbox"/>
NE	NE	Northern European Address Style	<input checked="" type="checkbox"/>
SA	SA	South American Address Style	<input checked="" type="checkbox"/>
SE	SE	Southern European Address Style	<input checked="" type="checkbox"/>

- With the Freeze Flexfield Definition check box unselected, create a new record in the Context Field Values region.

5. Enter the name of the style in the Code and Name fields.
6. Enter an optional description.
7. Click **Segments**.

The Segments Summary window appears.



8. Enter each element of your address style:
 - a. Enter a number that determines the order of the address element. The address elements appear in ascending order.
 - b. Enter the element Name and Window Prompt.
 - c. Select one of the available address components using the Column LOV.
 - d. Select the Displayed and Enabled check boxes.
9. Click **Save**.
10. Navigate to Application > Lookups > Application Object Library.
The Application Object Library Lookups window appears.
11. Search for ADDRESS_STYLE in the Type field using the Query Enter / Query Run search method available from the View menu.

The Application Object Library Lookups window lists the available address styles.

The screenshot shows the 'Application Object Library Lookups' window. At the top, there are fields for 'Type' (ADDRESS STYLE), 'User Name' (ADDRESS STYLE), 'Application' (Application Object Library), and 'Description' (Address entry style for Flexible Address Formats). To the right, there is an 'Access Level' section with radio buttons for 'User', 'Extensible', and 'System'. Below these fields is a table with columns: Code, Meaning, Description, Tag, From, To, and Enabled. The table contains several rows representing different address styles, with the 'AS_DEFAULT' row selected.

Code	Meaning	Description	Tag	From	To	Enabled
AS_DEFAULT	Oracle Sales Default	Oracle Sales Default /				<input checked="" type="checkbox"/>
JP	Japan	Japanese Address Sty				<input checked="" type="checkbox"/>
NE	Northern Europe	Northern European Ad				<input checked="" type="checkbox"/>
SA	South America	South American Addr				<input checked="" type="checkbox"/>
SE	Southern Europe	Southern European A				<input checked="" type="checkbox"/>
UAA	UK/Africa/Australasi	UK/Africa/Australasia /				<input checked="" type="checkbox"/>
USA	United States of Amc	United States of Amer				<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

12. Enter the code for your address style. The value you enter in the Code field must match the code you have entered in the Context Field Values.
13. Enter the wording the agents will see in the Meaning field.
14. Enter an optional description.
15. Make sure the Enabled check box is selected.
16. Click **Save**.

4.7.2 Mapping Countries to Address Styles

You must make sure that each country you are doing business with is mapped to the appropriate address style. Use the following procedure to map address styles.

Steps

1. Under the Receivables Manager Responsibility, navigate to Setup > System > Countries.
The Countries and Territories window appears.
2. Search for the countries that you want to set up using the Query/Enter Query/Run method.
3. Use the Address Style List of Values (LOV) to select the address style for each country.
4. Click **Save** on the toolbar.

4.8 Setting Up Custom Tabs on the Contact Center

Implementers can create two custom tabs in the Contact Center window by modifying the code for the Contact Center form and the associated library.

The customization must be made on a view or a table which has a reference or intersection with HZ_PARTIES. The fields that can be displayed in the custom tabs will be based on this view or table.

The implementer must write public APIs to perform transactions against this table. Code for insert, update and delete must be built into these APIs after the necessary validations.

The form you create can be compiled and run stand-alone. There are no dependencies for running this form.

This topic covers:

- Guidelines for Setting Up Custom Tabs on page 4-61
- Parameters Passed from the Contact Center Header on page 4-62
- Function Name for Custom Tabs on page 4-63

4.8.1 Guidelines for Setting Up Custom Tabs

These steps provide guidelines to help you with custom tab implementation.

Prerequisites

Knowledge of Oracle Forms development procedures and an understanding of Oracle TeleService code.

To set up the two custom tabs:

1. Customize the form using the following guidelines:
 - In the form CSCCUST1 . fmb and/or CSCCUST2 . fmb, create a data block with all the fields you wish to display in the custom tab.
 - Code an On Insert trigger for the data block to insert data into the tables.
 - Code an On Update trigger for the data block to update data in the tables.
 - Code an On Delete trigger for the data block to delete data from the tables.
 - The fields in the data block must be placed on the tabbed canvas CC_MAIN_TAB_CANVAS . CUSTOM1 and/or CC_MAIN_TAB_CANVAS . CUSTOM2 .

- Any record groups and LOVs must be coded.
 - In order to integrate this with the Contact Center, The data block, record groups, and LOVs for `CSCCUST1.fmb` must be dropped in the `CUSTOM1_OBJ_GRP` object group. Those for `CSCCUST2.fmb` must be dropped in the `CUSTOM1_OBJ_GRP2` object group.
2. Modify the library using the following guidelines:
- You can use any of the following event handlers:

Trigger Name	Description
WHEN-NEW-FORM-INSTANCE	This trigger calls WHEN-NEW-FORM-INSTANCE of the custom form. Code is added to the custom library based on the requirements of the custom form.
KEY-CLRFRM	This trigger calls CLEAR_CTRL_FIELDS which clears the control field values populated by values from the header region.
WHEN-NEW-FORM-INSTANCE RESTART	These triggers call the POPULATE_CTRL_FIELDS procedure which populates the control fields from the header region.
WHEN-TAB-PAGE-CHANGED	

- All the code to handle API calls can be put in the library `CSCCUST1.pld` and/or `CSCCUST2.pld`.
3. Integrate the forms with the Contact Center:
- a. Copy the forms `CSCCUST1.fmb` and/or `CSCCUST2.fmb` to the `$AU_TOP/forms/US` directory in the patched environment.
 - b. Compile the corresponding library and copy `CSCCUST1.pll` and/or `CSCCUST2.pll` to the `$AU_TOP/resource` directory in the patched environment.
 - c. Run the `adadmin` utility to compile CSC forms and libraries so that the changes made to the custom form and library are reflected in the Contact Center.

4.8.2 Parameters Passed from the Contact Center Header

The following parameters are passed from the Contact Center form to the `CSCCUST1` and `CSCCUST2` forms:

Parameter	Description
Customer_Header_blk.Cust_Party_Type	Customer's party type
customer_header_blk.cust_account_number	Customer's account number
customer_header_blk.cust_cust_acct_id	Customer's account identification number
contact_header_blk.cont_per_party_id	Identification number for the Contact's party of Person
contact_header_blk.cont_relationship_id	The identification number for the party relationship
contact_header_blk.cont_party_type	Contact's party type

4.8.3 Function Name for Custom Tabs

The function name for CSCCUST1 is CSCSFCU1. For CSCCUST2, it is CSCSFCU2. These functions are added to the CSC_CONTACT_CENTER_MENU. You can use it to hide and show the custom tabs.

By default, the tabs are hidden so you must enable the function in the menu CSC_CONTACT_CENTER_MENU.

Note: Please back up your custom forms and libraries before applying any future CSC patches for these files so they are not over-written in \$AU_TOP/forms/US and \$AU_TOP/. After the patch is applied successfully, you must copy the customized files back to these directories and run adadmin to generate CSC forms and libraries.

If Oracle supplies a bug fix in the future for the custom forms and libraries you modify, then you must copy your modifications from the backup to the newer version of the files.

4.9 Enabling E-Mail for the Contact Center

E-mail functionality in the Contact Center is provided through the Oracle eMail Center. Please see Implementing Oracle eMail Center and E-Mail Templates on page 1-89 for further details.

4.10 Setting Up Search Preferences

You can customize searches in the Contact Center by:

- Setting Up Service Key Search Preferences on page 4-65
- Limiting Searches to a Specific Country on page 4-65
- Modify the List of Service Keys Used for Searches on page 4-66
- Configuring Customer Search Window Defaults on page 4-66

4.10.1 Setting Up Service Key Search Preferences

Agents can display customer information in the Contact Center by entering any one of the following pieces of uniquely-identifying information, called service keys:

- Service Request Number
- Instance Name
- Order Number
- RMA Number
- Invoice Number
- Contract Number
- Serial Number
- Tag Number
- System
- Social Security Number

Agents can enter the service key either in the Contact Center header or the Customer Search window.

If the implementation includes an IVR system, the service key can also be entered directly by customers themselves.

The application displays customer contact information only for service request numbers. In this case, the contact displayed is the contact associated with the service request. If the contact for the service request is an internal employee, the application displays customer information only.

You can specify:

- Which service key is the default for agent searches by setting the system profile Customer Care: Default Contact Center Service Key to any one of the ten service keys. This specifies which service key appears by default in the Search By drop-down list in the Contact Center header and Customer Search windows.
- Which tab agents will see when they perform a service key search.
You can specify which tab displays by default for each of the service keys by setting the profile options listed in the following table:

Profile Name	Description	Possible Settings	Default Value
Customer Care: Default Tab for Service Request Number Service Key	Default tab to be displayed when the Service Key is a service request number	All tabs	Service Request tab
Customer Care: Default Tab for Order Number Service Key	Default tab to be displayed when the Service Key is an order number	All tabs	Orders tab
Customer Care: Default Tab for RMA Number Service Key	Default tab to be displayed when the Service Key is an RMA number	All tabs	Service Request tab
Customer Care: Default Tab for Invoice Number Service Key	Default tab to be displayed when the Service Key is an Invoice number	All tabs	Invoices tab
Customer Care: Default Tab for Contract Number Service Key	Default tab to be displayed when the Service Key is a Contract number	All tabs	Contracts tab
Customer Care: Default Tab for Serial Number Service Key	Default tab to be displayed when the Service Key is a Serial number	All tabs	Service Request tab
Customer Care: Default Tab for Tag Number Service Key	Default tab to be displayed when the Service Key is Tag number	All tabs	Service Request tab
Customer Care: Default Tab for System Service Key	Default tab to be displayed when the Service Key is a System number	All tabs	Service Request tab
Customer Care: Default Tab for Instance Name Service Key	Default tab to be displayed when the Service Key is an Instance Name	All tabs	Install Base tab
Customer Care: Default Tab for Social Security Number Service Key	Default Contact Center tab displayed when the Service Key a user enters is a social security number	All tabs	Dashboard tab

4.10.2 Limiting Searches to a Specific Country

You can limit all searches to customers in a specific country by setting the system profile Customer Care: Default Country for Filtering Records in the Contact Center

to a country of your choice. By default, this profile is null. This means that searches are not restricted by country.

4.10.3 Modify the List of Service Keys Used for Searches

The following lookup makes it possible for you to modify the values in the Search By drop-down list agents use to select a service key for a search in the Contact Center.

Lookup Type	Meaning	Lookup Code	Meaning	Level
CSC_CC_DEFAULT_SERVICE_KEY	Customer Care: Default Contact Center Service Key Lookup	<ul style="list-style-type: none"> ▪ CONTRACT_NUMBER ▪ EXTERNAL_REFERENCE ▪ INSTANCE_NAME ▪ INVOICE_NUMBER ▪ ORDER_NUMBER ▪ RMA_NUMBER ▪ SERIAL_NUMBER ▪ SERVICE_REQUEST_NUMBER ▪ SSN ▪ SYSTEM_NUMBER 	<ul style="list-style-type: none"> ▪ Contract Number ▪ Tag Number ▪ Instance Name ▪ Invoice Number ▪ Order Number ▪ RMA Number ▪ Serial Number ▪ Service Request Number ▪ SSN ▪ System 	User

4.10.4 Service Key Search Extensibility

You can extend the service key search using user hooks. The following steps provide guidelines to extend the service key search:

Extending the service key search:

1. Before enabling the service key user hook, verify that the CSC_Service_Key_CUHK package body has been created.

Note: After the Customer User Hook is enabled, the custom code written in CSC_Service_Key_CUHK package body is the only code executed. This means that none of the original product is executed after you enable the service key search customer user hook.

2. Set the execute_flag column value to Y in the JTF_USER_HOOKS table for the Customer User Hook that should be enabled.

The following script can be used to enable the Service Key search customer user hook:

```
UPDATE jtf_user_hooks SET execute_flag = 'Y'  
WHERE pkg_name = 'CSC_SERVICE_KEY_CUHK'  
AND api_name = 'SERVICE_KEY_SEARCH_PRE'  
AND processing_type = 'B'  
AND user_hook_type = 'C'
```

4.10.5 Configuring Customer Search Window Defaults

You can modify the behavior of the Customer Search window in two ways:

- Force agents to use the search window whenever they open the Contact Center
By setting the system profile Customer Care: Display Customer Search Window by Default to Yes, you can have the Customer Search window appear by default each time an agent launches the Contact Center, forcing the agent to search customer records before creating a new customer record.
- Specify whether you wish to display the Basic or Advanced search tab of the Customer Search window by default.

This is accomplished by setting the system profile Customer Care: Default Tab in Customer Search Window to the tab of your choice. By default, this profile is set to Basic.

4.11 Modifying the Behavior of Contact Center Tabs

You can modify the behavior of Contact Center tabs by:

- Setting default values in key fields to speed up agent entry
- Restricting access to tab functions or the entire tab itself
- Modifying the lookups which determine what agents see in the lists of values

The topics in this section cover the modifications you can make in each of the seeded Contact Center tabs:

- Dashboard on page 4-67
- Interactions on page 4-69
- Notes on page 4-69
- Tasks on page 4-70

- Service Request on page 4-72
- Contracts on page 4-73
- Install Base on page 4-74
- Invoices on page 4-74
- Orders on page 4-75
- Collateral on page 4-76
- Addresses on page 4-76
- Contact Points on page 4-77
- Accounts on page 4-78
- Party Information on page 4-79
- Relationships on page 4-80

4.11.1 Modifying the Behavior of the Dashboard Tab

The Dashboard tab displays summaries of key information about customers, accounts, and contacts. Agents can drill down to the individual documents summarized on the tab. To gather the information displayed in this tab and enable the drill-downs, you must set up Customer Profiles as described Setting Up Customer Profiles on page 4-2.

In addition, you can modify the behavior of the tab. You can:

- Limit drill-downs

By default, agents are permitted to open multiple windows when they drill down to detailed customer information. You can restrict them to just one drill-down by setting the system profile Customer Care: Open Multiple Sessions for Dashboard Drilldown to No.

- Permit automatic refresh of customer information

You can have the application refresh the customer information on the dashboard each time an agent displays a customer by setting the system profile Customer Care: Permit the Dashboard to be Refreshed Automatically to Yes. A setting of No, the default, requires the agent to click the Refresh button to update the display.

- Specify if the tab displays customer or account information by default.

Using the View By Account check box, agents specify whether they wish to display customer information for all accounts or for the account specified in the Account field of the Contact Center header. By default, the check box is not selected and the tab displays customer information for all accounts.

By setting the system profile Customer Care: Default Dashboard Display by Customer or Account to Account, the check box is selected by default and the dashboard summarizes only information about the account entered in the Contact Center header.

By default, this system profile is set to Party displaying summaries of all customer information.

- Restrict access to the tab and Refresh button by responsibility

You can specify which responsibilities can access the tab and button by mapping the functions listed in the following table according to the procedures described in *Oracle Applications System Administrator's Guide*. The seeded Customer Support responsibility maps all of these functions.

Description	Function
Access to the Dashboard tab	CSCSFDSB
Access to the Dashboard tab Refresh button	CSCSFRBU

4.11.2 Modifying the Behavior of the Interactions Tab

Agents use the Interactions tab to view the history of interactions with a customer. You can:

- Specify the number of records the tab displays

This is accomplished by entering the number in the system profile Customer Care: Number of Interactions Displayed in Contact Center. By default this system profile is set to 12.
- Restrict access to the tab or individual buttons by responsibility

You can specify which responsibilities can access the tab and buttons by mapping the functions listed in the following table according to the procedures described in *Oracle Applications System Administrator's Guide*. The seeded Customer Support responsibility maps all of these functions.

Description	Function
Access to the Interactions tab	CSCSFINT
Access the Account Interactions button	CSCFAAB
Access to the All Interactions button	CSCSFAIB

4.11.3 Modifying the Behavior of the Notes Tab and All Notes Window

You must set up notes as described in the *Oracle Common Application Components Implementation Guide*.

Agents can view notes either in the Notes tab or in the View All Party Notes Web browser page. The tab permits agents to view only one note at a time and to create new notes. The Web page displays all notes for the customer with no creation permitted.

For the Notes tab, you can:

- Specify the default note Type for new notes.
This is accomplished by setting the system profile Customer Care: Default a Type for New Notes in the Notes Tab. By default, there is no default.
- Specify the default note Status for new notes.
This is accomplished by setting the system profile Note: Default Note Status. By default, this profile is not set to any value. The default you enter affects not only new notes created in the Contact Center, but all notes in all applications.
- Restrict access to the tab and the ability to create new notes by responsibility.
You can specify which responsibilities can access the tab and create new notes by mapping the functions listed in the following table according to the procedures described in *Oracle Applications System Administrator's Guide*. The seeded Customer Support responsibility maps all of these functions.

Description	Function
Access to the Notes tab	CSCSFWKB
Create Notes on the Notes tab	CSCSFCNO

For the View All Party Notes page, you can:

- Include note details text in the list.

Note details store additional text in a separate table from regular notes text and can only be entered in a separate Details window. Displaying this text is accomplished by setting the system profile Customer Care: Display Note Details in All Party Notes Page by Default to Yes. By default this profile is set to No.

- Specify the number of records you wish to display at one time.
This is accomplished by setting the system profile Customer Care: Display Note Details in All Party Notes Page by Default to Yes. By default this profile is set to 10.
- Specify the maximum age of displayed notes.
You can specify in days how far back you want to display notes by making an entry in the Customer Care: Default Date Range for View All Party Notes Page. By default, this system profile is set to 30.

4.11.4 Modifying the Behavior of the Tasks Tab

You must set up tasks as described in the *Oracle Common Application Components Implementation Guide*.

You can specify different default values for agents creating new tasks on the tasks tab. You can set:

- The default task Type for new tasks
This is accomplished by setting the system profile Task Manager: Default Task Type. The selection you make affects all tasks, not just those created in the Contact Center. The default value is Breakfast.
- The default task Priority
This is accomplished by setting the system profile Task Manager: Default Task Priority. The selection you make affects all tasks, not just those created in the Contact Center. The default value is: Medium.
- The default task Status
This is accomplished by setting the system profile Task Manager: Default Task Status. The default setting is Open.
- The default Assignee Type, either a group, team, or individual employee
This is accomplished by setting the system profile Customer Care: Default Assignee Type for New Customer Tasks. Tasks can be assigned either to an individual employee (Employee Resource), a group (Group Resource), or a

team (Team Resource). By default this profile is set to Employee Resource. An assignee is the individual or group responsible for carrying out the work.

- The Assignee responsible for completing the task

This is accomplished by setting Customer Care: Default Assignee for New Customer Tasks to an assignee of type you have specified in Customer Care: Default Assignee Type for New Customer Tasks.

- The default type of owner assigned to customer-related tasks created on the Tasks tab

This is accomplished by setting the system profile Customer Care: Default Owner Type on the Contact Center Tasks Tab to the type of owner responsible for coordinating the completion of the task.

Task ownership can be assigned either to an individual employee (Employee Resource), a group (Group Resource), or a team (Team Resource). The default setting is Group Resource. All three owner types are set up in the Resource Manager foundation module.

The Owner Type does not display in the tab but determines which resources appear in the list of potential task owners. This system profile does not affect service request tasks created on the Service Request tab.

- The default task Owner for customer-related tasks

This is accomplished by setting the system profile Customer Care: Default Task Owner for New Customer Tasks to the resource of the type you have specified in the Customer Care: Default Owner Type for Contact Center Tasks. A task owner is the person or group responsible for coordinating the completion of the task.

- Restrict access to the tab and individual tab functions by responsibility

You can specify which responsibilities can access the tab and individual tab functions by mapping the functions listed in the following table according to the procedures described in *Oracle Applications System Administrator's Guide*. The seeded Customer Support responsibility maps all of these functions.

Description	Function
Access to the Tasks tab	CSCSFTSK
Create a task on the Tasks tab	CSCSFCTK
Update a task on the Tasks tab	CSCSFUTK

Description	Function
Access the Assignment Manager button next to the Owner and Assignee fields of the Tasks tab	CSCSFAMB
Access the Details button on the Tasks tab	CSCSFATB
Access to the Add Notes button on the Tasks tab	CSCSFANB
Access to the Use Template button on the Tasks tab	CSCSFUTB
Access to the Launch Workflow button on the Tasks tab	CSCSFLWF
Access to the More button on the Tasks tab	CSCSFMBU

4.11.5 Modifying the Behavior of the Service Request Tab

You can modify the behavior of the Contact Center Service Request tab by:

- Specifying different default values for agents creating new service requests

This is accomplished by setting the system profiles describe in the following table. Because agents can create service requests on both on this tab and in the Service Request window, all settings you make here apply to both.

System Profile	Description	Default Setting
Service: Default Service Request Type	Specifies the default value for service request Type	Customer Service Request
Service: Default Service Request Urgency	Specifies the default value for service request Urgency	High
Service: Default Service Request Severity	Specifies the default value for service request Severity	None
Service: Default Service Request Owner	Specifies the default value for service request Owner	None
Service: Default Service Request Status	Specifies the default value for service request Status.	Working
Service: Default Group Owner Type for Service Request	Specifies the default type of group for specifying a group owner. Available values are Group Resource and Team Resource.	Group Resource

System Profile	Description	Default Setting
Service: Default Group Owner for Service Requests	Specifies the default value for the group service request owner displayed in the Group field. The owner must be of the type you specify in Service: Default Group Owner Type for Service Request.	None
Service: Group Owner Mandatory	A setting of Yes, makes entry in the Group field mandatory.	No
Service: Individual Owner Mandatory	A setting of Yes, makes entry of the Owner field mandatory	No

- Restricting access to the tab and individual tab functions by responsibility.

You can specify which responsibilities can access the tab and individual tab functions by mapping the functions listed in the following table according to the procedures described in *Oracle Applications System Administrator's Guide*. The seeded Customer Support Responsibility includes this mapping.

Description	Function
Service Request Tab - Access Service Request Tab	CS_HA_AXS_SR_TAB
Service Request Tab - Access Charges Button	CS_HA_AXS_SRT_CHARGES_BTN
Service Request Tab - Access Folder Button	CS_HA_AXS_SR_TAB_FOLDER_BTN
Service Request Tab - Access Knowledgebase Button	CS_HA_AXS_SRT_KB_BTN
Service Request Tab - Access Log Button	CS_HA_AXS_SRT_LOG_BTN
Service Request Tab - Access Schedule Task Button	CS_HA_AXS_SRT_SCHL_TASK_BTN
Service Request Tab - Access Service Request Details Button	CS_HA_AXS_SRT_DETAILS_BTN
Service Request Tab - Access View Task Button	CS_HA_AXS_SRT_VIEW_TASK_BTN
Service Request Tab - Create Service Request	CS_HA_SR_TAB_INST_SR
Service Request Tab - Update Service Request	CS_HA_SR_TAB_UPDT_SR
Service Request Tab - View Service Request	CS_HA_SR_TAB_VIEW_SR

Description	Function
Service Request Tab - Access Attributes Button	CS_HA_AXS_SR_ATTR_BTN

- Setting the system profile Service: Autoquery the grid in Service Request tab to display the service request history in the non-telephony mode. The default setting for this profile is No.

4.11.6 Implementing the Contracts Tab

You must implement Oracle Contracts according to the procedures described in the *Oracle Service Contracts Concepts and Procedures*.

In addition, you can:

- Specify the date range for contracts displayed in the tab.

This is accomplished by setting OKS: Contact Center Date Range to the time period in days.

- Restrict access to the tab by responsibility.

You can specify which responsibilities can access the tab by mapping the function CSCSFOKS according to the procedures described in *Oracle Applications System Administrator's Guide*. The seeded Customer Support responsibility maps this function and permits access.

4.11.7 Restricting Access to the Install Base Tab

You can specify which responsibilities can access the tab by mapping the function CSCSFIB according to the procedures described in *Oracle Applications System Administrator's Guide*. The seeded Customer Support responsibility maps this function and permits access.

The lookup described in the following table makes it possible for you to modify the Install Base tab search criteria.

Lookup Type	Meaning	Lookup Code	Meaning	Level
CSI_CC_FILTER_CODES	Install Base Contact Center Filter Codes	<ul style="list-style-type: none"> ▪ CON ▪ INSN ▪ INST ▪ ORD ▪ SRL ▪ SYS ▪ TAG 	<ul style="list-style-type: none"> ▪ Contract Number ▪ Instance Name ▪ Item Instance ▪ Order Number ▪ Serial Number ▪ System ▪ Tag Number 	System

4.11.8 Setting Up the Invoices Tab

To display Oracle Receivables invoices on the Invoices tab of the Contact Center, you must implement Oracle Receivables as specified in *Oracle Receivables User Guide*. If agents are to use the windows accessed from the tab, including Transaction Details, Adjustment Processing, Payment Processing, and Payment Details, you must also implement Oracle Collections according to *Oracle Collections Implementation Guide*.

In addition you can:

- Specify the default time period in the From Date and To fields of the tab by setting the system profile Customer Care: Default Date Range for Invoices Tab.

You can set this profile at the system, site, responsibility, and user level. The default setting for this profile is 30. This means, that by default, the Invoices tab displays all invoices with transaction dates within the last thirty days.

- Specify the default value for the Include Closed as selected by setting the system profile Customer Care: By Default Include Closed Invoices in Invoices Tab. The default setting for this profile Option is No.
- Restrict access to the tab and its buttons by responsibility

You can specify which responsibilities can access the tab and buttons by mapping the functions listed in the following table according to the procedures described in *Oracle Applications System Administrator's Guide*. The seeded Customer Support responsibility maps all of these functions.

Description	Function
Access to the Invoices tab	CSCSFINV

Description	Function
Access to the Transaction Details button	CSCSFTDB
Access Adjustment Processing button	CSCSFAPB
Access Payment Processing button	CSCSFPBP
Access Payment Details button	CSCSFPDB

- Modify the search criteria for invoices

The lookup described in the following table makes it possible for you to modify the Invoice tab search criteria.

Lookup Type	Meaning	Lookup Code	Meaning	Level
CSC_CC_INVOICE_FILTERBY	Customer Care: Contact Center Invoice Tab Filter By	<ul style="list-style-type: none"> ■ ACCOUNT_NUMBER ■ INVOICE_NUMBER ■ ORDER_NUMBER ■ PO_NUMBER 	<ul style="list-style-type: none"> ■ Account Number ■ Invoice Number ■ Order Number ■ PO Number 	User

Note: The addition of new search criteria is not supported.

4.11.9 Modifying the Behavior of the Orders Tab

To display orders on the Orders tab of the Contact Center, you must Implement Oracle Order Management as specified in the *Oracle Order Management Implementation Manual*.

In addition, you can:

- Specify the default time period in the From Date and To fields of the Orders tab by setting the system profile Customer Care: Default Date Range for Orders Tab.

You can set this profile at the System, Site, Responsibility, and User level. The default setting for this profile is 30. This means, that by default, the Order tab displays all orders created within the last thirty days.

- Restrict access to the tab and its buttons by responsibility

You can specify which responsibilities can access the tab and buttons by mapping the functions listed in the following table according to the procedures

described in *Oracle Applications System Administrator's Guide*. The seeded Customer Support responsibility maps all of these functions.

Description	Function
Access to the Orders tab	CSCSFORD
Access to the New button	CSCSNORB
Access to the Details button	CSCSODEB

- Set the system profile OM: Sales Order Form Preference to launch the Order Management screen of choice.

You can access the System Profile Options window from the System Administrator responsibility. Query the profile OM: Sales Order Form Preference and choose the appropriate selection from the list of values. You must save your changes.

- Set the Orders tab as the default when the order number is used for customer identification by ensuring the system profile Customer Care: Default Tab for Order Number Service Key is set to the Orders tab. The default setting for this profile is the Orders tab.
- Modify the search criteria

The lookup described in the following table makes it possible for you to modify the Orders tab search criteria.

Lookup Type	Meaning	Lookup Code	Meaning	Level
CSC_CC_ORDERS_FILTER_BY	Customer Care: Contact Center Orders Tab Filter By	<ul style="list-style-type: none"> ■ ACCOUNT_NUMBER ■ ORDER_AMOUNT ■ ORDER_NUMBER ■ PRODUCT 	<ul style="list-style-type: none"> ■ Account Number ■ Order Amount ■ Order Number ■ Item 	User

Note: The addition of new search criteria is not supported.

4.11.10 Enabling the Collateral Tab

To enable the Collateral tab of the Contact Center, which agents can use to send both physical and electronic collateral to customers and to view collateral history,

you must implement Oracle One-to-One Fulfillment according to the *Oracle One-to-One Fulfillment Implementation Guide* and have the fulfillment server running.

You can:

- Specify which responsibilities can access the tab
 This is accomplished by mapping the function CSCSFCOL according to the procedures described in *Oracle Applications System Administrator's Guide*. The seeded Customer Support Responsibility includes this mapping.
- Improve the performance of collateral name searches
 This is accomplished by requiring agents to enter a minimum number of characters. You can do so by setting the system profile OTS: Minimum Number of Characters for Lookup to the number of characters you require for the search. A larger number makes the search more specific and improves performance. By default, this system profile is set to 0.

4.11.11 Modifying the Behavior of the Addresses Tab

You can:

- Restrict access to the tab and its buttons by responsibility
 You can specify which responsibilities can access the tab and buttons by mapping the functions listed in the following table according to the procedures described in *Oracle Applications System Administrator's Guide*. The seeded Customer Support responsibility maps and thus enables all of these functions.

Description	Function
Access to the Addresses tab	CSCSFADR
Create and update addresses on the Addresses tab	CSCSFCAD
Access to the Identifying Address button on the Addresses tab. This button is used to create or change the customer's identifying address.	CSCSFIAB
Access to the Site Contact Points button on the Addresses tab. This button makes it possible to enter addresses for customer sites.	CSCSFSCP

- Specify a default country for creating addresses and set up address formats for different countries. See *Specifying Global Address Formatting and Address Validation* on page 4-56.

- Modify the lists of values displayed in different lists of values

You can modify the values displayed in list of values by modifying the lookups listed in the following table. Please refer to Oracle Account Receivables documentation for details.

Lookup Type	Field	Type
PARTY_SITE_USE_CODE	Site Usage list of values	Extensible

4.11.12 Modifying the Behavior of the Contact Points Tab

You can:

- Specify which responsibilities can access the tab and create new contact points.

This is accomplished by mapping the functions listed in the following table according to the procedures described in *Oracle Applications System Administrator's Guide*. The seeded Customer Support responsibility maps and thus enables both functions.

Description	Function
Access to the Contact Points tab	CSCSFCPT
The ability to create contact points in the Contact Points tab	CSCSFCCP

- Modify the lists of values displayed in different lists of values

You can modify the values displayed in list of values by modifying the lookups listed in the following table. Please refer to Oracle Account Receivables documentation for details.

Lookup Type	Field	Type
COMMUNICATION_TYPE	Type field list of values	System
PHONE_LINE_TYPE	Contact Method list of values	Extensible

4.11.13 Restricting Access to the Accounts Tab and Account Details Window

You can specify which responsibilities can access the tab and the Account Details window launched from it, by mapping the functions listed in the following table according to the procedures described in *Oracle Applications System Administrator's Guide*. The seeded Customer Support responsibility maps and thus enables all functions on this tab.

Description	Function
Access to the Accounts tab	CSCSFACT
The ability to create accounts on the Accounts tab	CSCSFCAT
The ability to update account information in the Accounts tab	CSCSFUAT
Access to the Details button on the Accounts tab. This button launches the Customer Account Details window.	CSCSFADB
Access to the Credit tab of the Customer Account Details window.	CSCSFCRD
Access to the Roles tab of the Customer Account Details window and the ability to create and update roles.	CSCSFROL
Access to the Suspensions tab of the Customer Account Details window.	CSCSFSUS
Access to the Sites tab of the Customer Account Details window.	CSCSFSIT
Access to the Relationships tab of the Customer Account Details window and the ability to create new relationships.	CSCSFRTB
Access to the Customer Standard button on the Accounts Tab. This button launches the Customers - Standard window.	CSCSFCSN

4.11.14 Modifying the Behavior of the Party Information Tab and Its Functions

You can:

- Specify which responsibilities can access the tab and its different functions

This is accomplished by mapping the functions listed in the following table according to the procedures described in *Oracle Applications System Administrator's Guide*. The seeded Customer Support responsibility maps and thus enables all functions on this tab.

Description	Function
Access to the Party Information tab	CSCSFPTY
The ability to update customer information on the Party Information tab	CSCSFUPI
Access to the Details button on the Party Information tab	CSCSFDBU
Access to the Contact Restrictions button on the Party Information tab	CSCSFCRB

- Modify the lists of values displayed in different lists of values

You can modify the values displayed in list of values by modifying the lookups listed in the following table. Please refer to Oracle Account Receivables documentation for details.

Lookup Type	Field	Type
CONTACT_TYPE	Contact Method field in the Contact Restrictions window. This window is available from the tab by clicking Contact Restrictions	Extensible
DEPARTMENT_TYPE	Dept Code field used in the tab when the customer is an individual	User
MARITAL_STATUS	Marital Status field used in the tab when the customer is an individual	User
YES/NO	Residence Status field used in the tab when the customer is an individual	System
CODE_STATUS	Status field	System
SIC_CODE_TYPE	SIC Code Type field for customers of type organization	Extensible
RESPONSIBILITY	The Title field on the Person Details window available by clicking Details for a customer of type person	Extensible
INTEREST_TYPE	Interest Type list of values in the Person Details and Organization Details windows.	User
HZ_PERSON_IDEN_TYPE	Person Id Type list of values for customer of type person	Extensible

4.11.15 Modifying the Behavior of the Relationships Tab

You can:

- Specify which responsibilities can access the tab and create relationships

This is accomplished by mapping the functions listed in the following table according to the procedures described in *Oracle Applications System Administrator's Guide*. The seeded Customer Support responsibility maps and thus enables both functions.

Description	Function
Access to the Relationships tab	CSCSFREL
The ability to create relationships on the Relationships tab.	CSCSFCRE

- Modify the lists of values displayed in different lists of values

You can modify the values displayed in list of values by modifying the lookups listed in the following table. Please refer to Oracle Account Receivables documentation for details.

Lookup Type	Field	Type
PARTY_RELATIONS_TYPE	Sets up the list of relationships between individuals and organizations.	Extensible
CODE_STATUS	Dept Code field used in the tab when the customer is an individual	System
RESPONSIBILITY	Marital Status field used in the tab when the customer is an individual	Extensible

4.12 Modifying the Behavior of the Contact Center Header

To modify the behavior of the Contact Center header, you can:

- Prevent users or groups of users from modifying a customer name displayed in the Contact Center header

This is accomplished by setting the system profile HZ: Change Party Name to No. By default this system profile is set to Yes. You can set this profile at the site, application, or individual user level.

- Select to view details of customer or contact information by default

By making a selection from the View Details For drop-down list, agents can specify whether they wish to view customer or customer contact information in the Contact Center tabs.

However, the following tabs are limited to displaying details on customers only:

- Interactions
- Tasks
- Contracts
- Invoices
- Orders
- Collateral
- Accounts

You can specify the default setting of the View Details for drop-down list by setting the system profile Customer Care: Default View in Contact Center to either Customer or Contact. By default this profile is set to Customer.

- Specify whether you wish to include inactive accounts in the list of accounts
The system profile Customer Care: Display Only Active Accounts in Contact Center determines whether inactive accounts are shown in the Acct Num field LOV of the Contact Center. A setting of Yes shows only active accounts. A setting of No includes inactive accounts as well. By default this system profile is set to Yes.
- Specify whether you wish to display inactive customer records
The system profile Customer Care: Display Only Active Customers in Contact Center determines whether inactive customers are included in the Name LOV. A setting of Yes restricts the list to active parties. A setting of No includes inactive customers as well. By default this system profile is set to Yes.
- Default the first customer account in the Acct Num field
Setting the system profile Customer Care: Default first account for a customer in Contact Center form to Yes defaults the first customer account record in the database in the Acct Num field of the Contact Center header. A setting of No leaves the field blank. By default, this system profile is set to Yes.
- Specify the default country for filtering records in the Contact Center.

Setting the system profile Customer Care: Restrict Searches to a Specific Country specifies whether customer searches in the Contact Center are limited by default to a specific country. The default profile is None.

- Specify the default party type on Contact Center header.
Setting the system profile Customer Care: Default Customer Type on Contact Center, determines the default value for the Type field within the Customer region on the Contact Center header. The default profile is Organization.
- Specify the default tab for Contact Center.
Setting the default value on the system profile Customer Care: Default Tab for Contact Center determines which tab defaults when opening the Contact Center form. The default profile is Dashboard.
- Specify the default service key for searches
See Setting Up Service Key Search Preferences on page 4-64 for setup details.
- Speed up customer searches by phone number by requiring agents to enter a minimum number of digits
The system profile Customer Care: Minimum Number of Characters for Phone Search specifies the minimum number of phone number digits agents must enter in the Phone field in the Contact Center header when they search for a customer using the phone number. This search matches the concatenated phone number, ignoring any spaces or other delimiters. Greater number of digits improve search performance. By default, no number is specified.
- Specify the default title for contacts
Customer Care: Default Title for a Person defaults the title for the contact in the Contact region of the Contact Center header. There is no seeded default value.
- Modify the wording of the View Details For drop-down list
The system lookup described in the following table makes it possible for you to modify the wording agents see in the View Details For drop-down list. meaning column.

Lookup Type	Meaning	Lookup Code	Meaning	Level
CSC_CC_VIEW_BY	Customer Care: View by's in Contact Center form	<ul style="list-style-type: none"> ■ CONTACT ■ CUSTOMER 	<ul style="list-style-type: none"> ■ Contact ■ Customer 	System

- Modify the values displayed in different lists of values

You can modify the values displayed in a number of other fields by modifying the following Oracle Account Receivables lookups:

- PARTY_TYPE
- CONTACT_TITLE
- PHONE_LINE_TYPE
- CODE_STATUS
- PARTY_RELATIONS_TYPE
- SITE_USE_CODE
- PARTY_SITE_USE_CODE

Please see Oracle Account Receivables documentation for details.

4.13 Enabling Telephony

To enable telephony in the Contact Center, you must implement Oracle Advanced Outbound and Oracle Advanced Inbound as described in the *Oracle Advanced Outbound Implementation Guide*, the *Oracle Advanced Inbound Implementation Guide* and the *Oracle Interaction Blending Implementation Guide*.

In addition, you can:

- Improve the performance of automatic identification of customers via Automatic Number Identification (ANI)

This is accomplished by setting the system profile Customer Care: Use Exact Matches in ANI Searches to Yes.

A Yes setting restricts the search to exact matches improving performance.

A No setting permits the application to use an inexact match. This may be preferable in locations where multiple telephone codes may prevent exact matches, however.

- Specify which responsibilities can access the SoftPhone icon in the toolbar

This is accomplished by mapping the function CSCSFSPB according to the procedures described in *Oracle Applications System Administrator's Guide*. The seeded Customer Support Responsibility includes this mapping and thus enables the icon. The SoftPhone is used by agents for both inbound and outbound calls.

- Specify which responsibilities can access the Initiate Call button in the Contact Center header, Contact Points tab, and the Tools menu.

This is accomplished by mapping the function CSCSFPBU according to the procedures described in *Oracle Applications System Administrator's Guide*.

4.14 Enabling Oracle Knowledge Management

To enable knowledge searches within the Contact Center you must implement the Oracle Knowledge Management service foundation module according to the procedures described in *Oracle Knowledge Management Implementation Guide*.

You can specify which responsibilities can:

- Access the Knowledge Base Search icon in the toolbar, by mapping the function Access Knowledge Base Icon (CSCSKBIC) according to the procedures described in *Oracle Applications System Administrator's Guide*.
- Access the Search Knowledge button within the Service Request tab, by mapping the function Service Request Tab - Access Knowledgebase Button (CS_HA_AXS_SRT_KB_BTN), according to the procedures described in *Oracle Applications System Administrator's Guide*.

The seeded Customer Support Responsibility includes these mappings and thus enables the searches.

4.15 Enabling Oracle Scripting

You must create scripts and implement scripting according to the procedures described in *Oracle Scripting Developer's Guide*, *Oracle Scripting Implementation Guide*, and the *Oracle Scripting User Guide*.

In addition, the system profiles in the following table enable Oracle Scripting in the Contact Center and modify the performance of scripts.

Here is an explanation of the table's columns:

- System Profile Name: The system profile name. An asterisk (*) next to a profile name indicates the profile is new in this release.
- Description: A description
- Level: A list of abbreviations representing the different levels at which the profile can be set:

* S: Site

- * A: Application
- * R: Responsibility
- * U: User

- Default Setting and Level: The seeded default setting and the seeded level.

System Profile Name	Description	Level	Default Setting and Level
Customer Care: Automatically Launch a Script for Identified Callers	This profile defaults a script in the Oracle Scripting window used to launch a script.	S,A,R,U	None Default Level: S
CSC: Server Machine for Oracle Scripting	Name of the host computer where the scripting server resides.	S,A,R,U	None Default Level: S
CSC: Port for Oracle Scripting Application	Port for communicating with the scripting server.	S,A,R,U	None Default Level: S
CSC: SID of Oracle Scripting Database	The database used to support the scripting tool.	S,A,R,U	None
CSC: Oracle Scripting Three Tier Installation	Specifies if the scripting server is a two- or three-tier installation.	S,A,R,U	None

4.16 Specifying the Defaults for Overriding Customer Criticality

Agents use the Override Customer Criticality window to change the status of a customer to critical or to remove the customer from the critical list. You can:

- Specify the profile check used to determine if a customer is critical
You can do so by setting the system profile Customer Care: Profile Check for Determining Customer Criticality to the profile check you wish to use.
- Modify the reasons agents give for the change they make

You can do this by updating the lookup described in the table below:

Lookup Type	Meaning	Lookup Code	Meaning	Level
CSC_CRITICUST_OVERRIDE_REASONS	Reasons to override Customer Criticality	<ul style="list-style-type: none"> ■ CRUCIAL_IMPLEMENTATION ■ DELICATE_SITUATION 	<ul style="list-style-type: none"> ■ Crucial Implementation ■ Delicate Situation 	User

Implementing Charges

This group of topics describes the setup and configuration tasks required to successfully implement the Charges module of Oracle TeleService.

It covers:

- Overview of Charges on page 5-1
- Charges Setup Overview on page 5-3
- Setting Up Business Processes, Service Activities, and Billing Types on page 5-6
- Setting Up Oracle Install Base Transaction Subtypes on page 5-14
- Setting Up Items in Oracle Inventory on page 5-20
- Setting Up Labor Schedules for Pricing Labor on page 5-25
- Setting Up Rules for Defaulting the Operating Unit on page 5-30
- Creating Orders from Charges Across Operating Units on page 5-31
- Modifying the Display of Charges on Customer Invoices on page 5-33
- Setting Up System Profiles on page 5-34
- Setting Up Remaining System Profiles on page 5-35

5.1 Overview of Charges

Charges is a component of the Oracle TeleService application that is used by many Oracle applications including Oracle Field Service and Oracle Depot Repair.

Typical business needs that Charges supports are as follows:

- Create orders for shipments

- Create return orders (RMA)
- Bill customers for any services provided to them

Charges has the following basic features and functions:

- Create and view charge lines (shipments, returns, and billing)
- Create and view estimated charge lines and convert them to actual charges
- Roll up charge lines (labor, material, expenses) into a defined item (labor, material, and expenses)
- Associate charge lines with an existing order
- Apply contract terms and conditions to charge lines. For example, discounts and labor pricing.
- View coverage information for a contract
- Submit charge lines to Oracle Order Management through Oracle Quoting
- Achieve multi-currency compliance

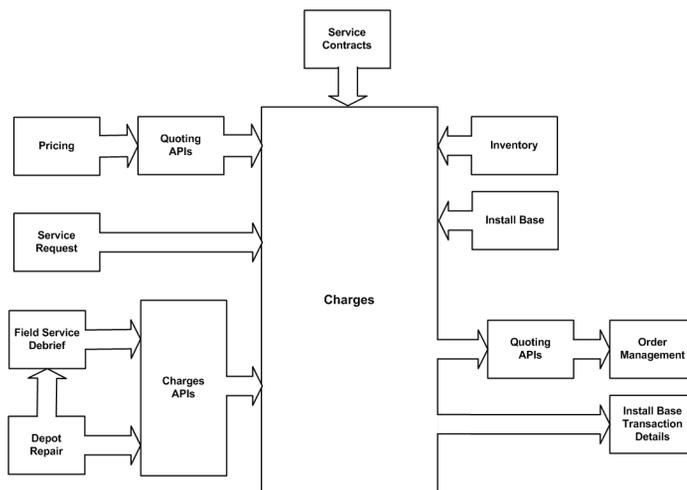
5.1.1 Architecture of Charges

Charges windows remain based on the Oracle Forms technology stack.

Charges integrates with the following Oracle applications:

- Oracle Field Service
- Oracle Depot Repair
- Oracle Contracts
- Oracle Quoting
- Oracle Inventory
- Oracle Install Base
- Oracle Order Management

The following diagram illustrates the architecture and data flow for Charges:



Charges integrates with Oracle Order Management for returns, shipments, and billing through APIs provided by Oracle Quoting. When you book an order (shipment or return), Oracle Quoting APIs pass the order to Oracle Order Management, an application that determines how the order is filled and shipped. Oracle Quoting APIs then give you a confirmation number that is displayed in the Charges window in the Line Number field. After the invoice cycle is complete, the invoice number and the invoice date are also displayed on the Order Status tabbed page of the Charges window in the Invoice Number and Invoice Date fields respectively. If an order line is split in Oracle Order Management, then Charges displays the status of the first line.

Oracle Service Contracts, Oracle Inventory, and Oracle Install Base integrate directly with Charges, whereas Oracle Field Service Debrief, Oracle Pricing, and Oracle Depot Repair communicate with Charges through Charges APIs. Oracle Pricing communicates with Charges through Oracle Quoting APIs.

5.2 Setup Overview

Use this procedure as an overview of the major steps required to set up the Charges module of Oracle TeleService. The details of each of the steps listed below are covered in the associated section of this chapter:

Prerequisites:

You must have completed implementation of the following applications:

- Oracle Order Management
- Oracle Advanced Pricing
- Oracle Service Contracts
- Oracle Inventory
- The following are optional:
- Oracle Install Base
- Oracle Field Service

To set up Charges:

1. Set up or verify the setups of your inventory items. The application uses inventory items not only for tracking physical items but also for pricing labor and expenses. You set up labor items in Oracle Inventory and price them using price lists in Oracle Advanced Pricing. See *Setting Up Items in Oracle Inventory* on page 5-20.
2. Implement Oracle Order Management. For example, you must set up Line Types, Defaulting Rules, and Oracle Workflow processes assigned to the different line types and headers.
3. Set up labor schedules for pricing labor in Oracle Service Contracts and a default schedule for labor not covered by contract. See *Setting Up Labor Schedules for Pricing Labor* on page 5-25.
4. Set up any discounts for the labor items within Oracle Service Contracts. See *Oracle Service Contracts Concepts and Procedures* for details.
5. Set up the rules for defaulting the operating unit, the financial entity that is used for billing and receiving payments from the customer. See *Setting Up Rules for Defaulting the Operating Unit* on page 5-30.
6. Set up Business Processes, Service Activities, and Billing Types as described in *Setting Up Business Processes, Service Activities, and Billing Types* on page 5-6.
7. If you wish agents to ship or receive items tracked by Oracle Install Base, then you must set up the Install Base Transaction Subtypes. See *Setting Up Install Base Transaction Subtypes* on page 5-14.

8. Optionally, you can modify the way charges are displayed on customer invoices. See *Modifying the Display of Charges on Customer Invoices* on page 5-33.
9. If you are using Oracle Field Service, you can automate the submission of charges to Oracle Order Management.

5.3 Setting Up Business Processes, Service Activities, and Billing Types

This section explains how to set up the classification system your agents use to enter the labor, parts, and expenses that are processed, shipped, and billed through Oracle Order Management.

This section covers:

- Key Concepts on page 5-6
- Process Overview on page 5-8
- Setting Up Additional Service Billing Types on page 5-9
- Associating Billing Types with Billing Categories on page 5-9
- Setting Up Service Activities on page 5-10
- Setting Up Business

5.3.1 Key Concepts

To enter a charge line, an agent must select:

1. A business process
2. A service activity
3. An inventory item
4. If the item the agent enters is a physical item tracked by Oracle Install Base then the agent may also be required to enter an instance number. For example, an agent entering a unit to be returned.

Business Process A business process provides a general classification of the work performed. Examples include depot repair, field service, and customer support. The business process is the first entry agents make on a charge line.

Service Activity Each business process is associated with a list of activities that can be performed as part of that process.

For example, if the business process involves the shipment of a replacement piece of equipment to the customer, the return of the defective equipment, and the installation of the new piece of equipment at the customer site by a field service technician, then you may wish to set up three activities "Ship Replacement", "Return Defective Equipment", "Install Replacement Equipment".

You must classify each activity as either of type order or of type return. Order activities can be related to bill-only lines, or the shipment of items to customers. Return activities are used for recording customer returns of items they own.

In the above case the Ship Replacement and Install Replacement Equipment are activities of type order. The Return Defective Equipment is of type return.

Service activities are reusable: you can associate one activity to multiple business processes.

The activity the agent selects determines which inventory items they can enter in the charge line. However, activities restrict the list of inventory items only indirectly through an inventory classification called a billing type.

Billing Types Billing types are used to categorize items in inventory for use in service applications. For example, you associate the labor billing type with all of the different labor rates in inventory, and the material billing type with all of the parts and equipment in inventory that can be sold to customers.

By associating billing types with service activities you determine what items an agent can enter in a charge line for a given activity.

You can associate multiple billing types to a single service activity. For example, a repair activity may have billing types of material (the parts used in the repair), labor, and expenses (travel).

You may choose to associate the Ship Replacement activity from the above example, with two billing types: material (the new piece of equipment) and expense (shipping charges).

The Return Defective Equipment activity may just have one billing type: material (the equipment being returned).

The Install Replacement Equipment activity may be associated with three billing types: Material (for any additional parts needed by the field technician), labor (the labor involved in installing the new equipment), and expenses (any non-itemized costs).

The application comes with several billing types defined for you, but you can add as many additional billing types as you like by modifying the lookup code `MTL_SERVICE_BILLABLE_FLAG`.

For an item to appear in the list of items in Charges, you must associate it with a billing type.

Billing Categories If you have created any additional billing types, you must classify them as either material, labor, or an expense. The categorization, using Billing Categories, ensures it is processed correctly by Charges and other applications that use Charges, including Oracle Field Service.

Business Processes, Service Activities, and Billing Types in Contracts Business processes, together with service activities and billing types, are used by Oracle Contracts to specify the level of coverage and discounts for a customer. A contract may cover different business processes differently. For example, a customer's service-level agreement may provide free customer support over the phone, offer a 10 percent discount for in-house depot repairs, but charge the customer fully for field service visits.

5.3.2 Process Overview

This topic outlines the major steps you need to perform to set up the business processes, service activities, and billing types classification system.

To set up business processes, service activities, and billing types:

1. Several billing types are set up for you, but you can set up as many as you need following the procedure described in Setting Up Additional Service Billing Types on page 5-9.
2. You must classify any additional billing types you have created as material, labor, or expense by associating them with Billing Categories. See Associating Billing Types with Billing Categories on page 5-9.
3. Set up the service activities as described in Setting Up Service Activities on page 5-10. This involves:
 - a. Defining the service activities and associating each with all the billing types used for that activity. This restricts agent choices of inventory items to those associated with the billing types you associate here.
 - b. To ensure that the items entered are processed through Oracle Order Management, you must associate each service activity and billing type pair with at least one operating unit and specify the header and line type for the order.
 - c. For any activity that involves the shipment or receipt of items tracked by Oracle Install Base, you must set up a corresponding Oracle Install Base transaction subtype according to the procedure described in Setting Up Install Base Transaction Subtypes on page 5-14.

4. Set up the business processes agents will use to classify work for the customer and associate them with appropriate activities. See *Setting Up Business Processes* on page 5-13.

5.3.3 Setting Up Additional Service Billing Types

Use this procedure to set up additional service billing types. You can create as many billing types as you need.

To set up additional service billing types:

1. Navigate to the Others > Service: Lookups.
2. Using the Query By Example method, display the lookup type MTL_SERVICE_BILLABLE_FLAG.
3. Enter the additional billing types. The Meaning field is what appears in the lists of values.
4. Save your work.
5. You must now classify the billing types you have created into the three billing categories: Labor, Material, and Expense. See *Associating Billing Types with Billing Categories* on page 5-9.

5.3.4 Associating Billing Types with Billing Categories

Use this procedure to classify any billing types you have created as Labor, Material, or Expense. Only billing types associated with these billing categories are available for use in service applications.

To associate billing types with billing categories:

1. Navigate to Setup > Charges > Billing Type Attributes.
The Billing Type Attributes window appears.

Billing Type	Billing Category	Start Date	End Date	Rollup Item	Description
Material	Material	13-AUG-2002		Material	Miscellaneous Material Charge
Expense	Expense	13-AUG-2002		Expense	Expense Charge for Service
Labor	Labor	13-AUG-2002		Labor	Labor Charges for Service

2. Enter the billing type using the Billing Type list of values (LOV).
3. Classify the billing type as either a Material, Expense, or Labor billing category using the Billing Category LOV.
4. It is not necessary for you to enter dates in the Start Date and End Date fields as this controls the availability of the billing type to category mapping and not the billing type itself. The start date is populated for you automatically.
5. Using the Rollup Item LOV you can specify a single item to appear on customer invoices as a substitute for all of the items classified by the billing type. For example, substituting the general term "Overtime" for multiple overtime labor rates. For an explanation of roll-up items, see Modifying the Display of Charges on Customer Invoices on page 5-33.

5.3.5 Setting Up Service Activities

Use this procedure to set up service activities that field-service, depot, and call center agents use to classify work performed on behalf of a customer.

Note: You must create separate activities of type order for Oracle Field Service (Debrief) and Oracle TeleService Charges module if a customer’s installed base is being updated. This is because Oracle Field Service and Oracle TeleService update the customer’s installed base separately.

To set up a service activity:

1. Navigate to Setup > Charges > Service Activities and Billing Types.

The Service Activities and Billing Types window appears.

Service Activity	Description	Line Category	Start Date	End Date	Depot Repair Quantity Update	OM Interface	No Charge
Advanced Exchange Pro	Advanced Exchange Product	Order	07-AUG-2001		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Advanced Replacement			17-JAN-1998		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Annual Maintenance		Order	18-DEC-2003		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Autocreate Systems	AutoCreate Systems	Order	03-DEC-2003		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Charge - Expenses	Charge for Repair Expenses (travel)		25-JUN-2000		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Charge - Flat Fee	Charge Flat Fee for Service		25-JUN-2000		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Charge - Labor	Charge for Repair Labor		25-JUN-2000		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Charge - Parts/Material	Used to charge for Depot Repair P		25-JUN-2000		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Name	Description	Start Date	End Date
Expense	Billable flag for Service Expense Billable	09-AUG-2001	09-AUG-2001
Labor	Billable flag for Service Labor Billable	09-AUG-2001	09-AUG-2001
Material	Billable flag for Service Material Billable		

Operating Unit	Order Type	Line Type
Vision Operations	Mixed	Standard (Line Invoicing)

2. Click **New** in the toolbar.
3. Enter a name and an optional description in the Service Activity and Description fields.
4. Specify if this activity is related to an order or a return by making a selection with the Line Category LOV. This setting prevents a single service activity from being used for an order in one operating unit and a return in another.
5. If you plan to use this activity in Oracle Depot Repair, then select the Oracle Depot Repair Quantity update check box.
6. If this activity does not incur any charges to the customer, then select the No Charge check box. The item still appears on the customer invoice but with no charge. You are setting up the default value only. The agent can change it when they enter a charge.
7. If this activity is not billed to customers but has to be entered as a charge line by agents for costing purposes (for example, for tracking travel expenditures), then unselect the OM Interface check box. If this check box is unselected, then charges for it do not appear on the customer invoice.

Leaving the check box selected (the default value) means the customer is billed for any charges for this activity.

The setting you select is the default value only. The agent can change the status of this check box when they enter a charge.

8. Specify the billing types that can be used with the service activity. You can have multiple billing types for a single activity. For example, the replacement of a defective part may include material (the part itself), the labor required to install it, and expenses for shipping or travel. For each Billing type:
 - a. With the activity selected, place your cursor in the Billing Types region and click **New** in the toolbar.
 - b. Select the billing type using the Name LOV.
 - c. Optionally, you can control the availability of the billing type by entering dates in the Start Date and End Date fields.
9. For each activity and billing type pair, enter all of the operating units together with the Oracle Order Management order and line types. You may have multiple operating units if, for example, you have a central support center that is dispatching repair crews or parts from different locations (operating units):

Note: The Operating Unit is an entity used by financial applications to create, process, and report on financial data. It is not the same as an Inventory Organization, an organization for which you track inventory transactions and balances, and/or an organization that manufactures or distributes products.

- a. Select the activity and one of the billing types you have associated to the activity in the previous step.
 - b. In the Order Management Header and Line types region, enter the operating unit, order type, and line type that will be used by Oracle Order Management to process the order. Repeat this step for each possible operating unit.
 - c. Repeat this procedure for each of the billing types associated with the activity.
10. If agents are going to be using the activity you have set up to enter items tracked by the Oracle Install Base, then you must set up the activity as an Oracle

Install Base transaction type. See Setting Up Install Base Transaction Subtypes on page 5-14.

5.3.6 Setting Up Business Processes

Use this procedure to define the business processes and the activities that belong to them.

Prerequisites

You must set up service activities first.

To setup of service business processes:

1. Under the Customer Support Responsibility, navigate to Setup > Charges > Service Business Process.

The Service Business Process window appears.

Service Business Processes		
Name		
Description		
<input checked="" type="checkbox"/> Depot Repair	<input checked="" type="checkbox"/> Service Request	
<input checked="" type="checkbox"/> Field Service		
Effective Date		

Service Activities		
Service Activity	Start Date	End Date

2. Enter a name of the business process you wish to create in the Name field. The name is what agents will see in Charges.
3. Enter an optional description.
4. Specify one or more applications where you wish this business process to be visible by selecting the appropriate check boxes: Depot Repair (Oracle Depot

Repair), Field Service (Oracle Field Service), Service Request (Oracle TeleService).

5. In the Service Activities region, enter the activities you wish to associate with this business process. Optionally, you can enter start and end dates for activities if you wish to control their availability.
6. Save your work by clicking **Save** in the toolbar.

5.4 Setting Up Oracle Install Base Transaction Subtypes

If you wish agents to ship or receive items tracked by Oracle Install Base, then you must set up the service activities associated with those items as Oracle Install Base Transaction Subtypes.

Inventory items are associated with service activities indirectly through their billing types. You can find which activities need to be set up by looking at the billing type of an item and viewing all of the service activities associated with that billing type.

Prerequisites

You must create service activities before you can create them as install base transaction types.

You must know whether the activities are of type return or order. Return activities are used by agents to record items to be shipped back by customers. Order activities are used to ship items out.

To set up Oracle Install Base transaction subtypes:

1. Navigate to Setup > Charges > Install Base Transaction Types.

The Transaction Sub Types window appears.

The screenshot shows the 'Transaction Sub Types' configuration window. It includes the following sections:

- Service Info:** Service Type , Name , Description , Seeded , Freeze .
- Source Info:** Reference Req'd , Change Owner , Change Owner To , Status , Return Req'd , Revision Req'd .
- Non Source Info:** Reference Req'd , Change Owner , Change Owner To , Status , Return Req'd .
- Parent Info:** Reference Req'd , Status , Revision Req'd .
- Source Transaction Types Table:**

Application Name	Transaction Name	Transaction Type	Description	Source Object	In Out	Default	Update IB
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Select the Service Type check box.
3. Select the service activity you would like to set up from the Name list of values.

Note: Different types of activities require different setups in the Source and Non Source Info regions. For information on valid use case for these setups see Summaries of Setups for Valid Cases on page 5-17.

4. If the activity you are setting up is of type return, used by agents to record return of parts from customers, then set up the Source Info region:
 - a. Select the Reference Rqd check box.
 - b. If you wish to change ownership of the part, then select the Change Owner check box and select `INTERNAL` from the Change Owner to drop-down box. This indicates the part is now owned by your organization.
 - c. If you want to update the status of the item in the customer's installed base, then select a new status using the Status LOV.

- d. If you wish to require agents to enter a date in the Return By date field in Charges then select the Return Req'd check box. The return by date is the date the return must be received.
5. If the service activity is of type order, used by agents to ship replacement parts to customers, then make entries in the Non Source Info region. You can either require agents to enter the instance of the part being replaced or you can choose to make the entry optional.

Making the entry optional is useful for enabling agent to ship replacement parts to a customer if the instance of the part being replaced is not known. For example, you may wish to ship a replacement computer board to a customer with ten computers without knowing which instance is being replaced.

- To make instance entry optional, leave the check box unselected and optionally populate the other fields. In this case agents will be permitted but not required to enter instance information for the customer item being replaced.
- If you wish to require agents to enter the instance information for the item being returned by the customer, then:
 - a. Select the Reference Req'd check box in the Non Source Info region. This check box requires agents to enter an instance or serial number for the item being replaced.
 - b. If you wish to record the change of ownership of the part, then select the Change Owner check box and select `External` from the Change Owner to drop-down box. This indicates the part is now owned by the customer.
 - c. If you want to update the status of the item in the customer's installed base, then select a new status using the Status LOV.

Note: The Parent info region is reserved for future use.

6. In the Source Transaction Types region:
- a. Use the Application Name LOV to enter Oracle Order Management. This permits Oracle TeleService and Oracle Depot Repair users to use this subtype.
 - b. Select a valid source transaction type from the Transaction Name LOV. Source transactions types are used by Oracle Install Base and are set up according to procedures described in the *Oracle Install Base Implementation Guide*.

- c. Select the Update IB check box. This permits Order Management to update the customer's installed base when an item is shipped or received.
- d. Select the Default check box if you wish this subtype to be the default for Oracle Order Management.

Note: The Source Object field and the In Out check boxes are reserved for future use.

- 7. Enter any other applications that you wish to permit to use this subtype.

Note: You cannot have more than one application update the installed base at the same time. This means that you should create separate service activities and subtypes for Oracle Field Service and Charges. If you do want to use the same subtype for both, however, then you can permit only one application to make the update by selecting the Update IB check box for only one application.

5.4.0.1 Summaries of Setups for Valid Cases

The use cases below summarize the valid cases and required setups for both order (shipping) and return activities.

When agents enter an item to be shipped or received from a customer, they must first select the business process and activity which restricts their choice of items to those valid for that activity. Agents enter the item by inventory item number using the Item list of values (LOV).

If you set up the service activity as a transaction subtype, then the list of items includes all valid items for that activity regardless if they are tracked by the install base or not.

If you do not set up an activity as an Oracle Install Base transaction subtype, then the Item LOV excludes all items tracked by Oracle Install Base from this list.

For each item in inventory it is the Install Base Trackable check box on the Service tab of the Item Master window that determines if that item is tracked by Oracle Install Base.

Case #1: Ship an item not tracked by Oracle Install Base

If the agent uses the activity to enter only items not tracked by the installed base, then you do not need to set up the Oracle Install Base transaction subtype for it.

If the subtype is not set up, then the Item list of values (LOV) excludes items tracked by Oracle Install Base for the service activity.

Setup

- The activity must be of type order.
- Setup of transaction subtype not required

Case #2: Ship an item tracked by Oracle Install Base as a replacement for another tracked item (Require Instance Entry)

If you want agents to ship an installed-base tracked item to replace an existing item already in the customer's installed base, then you must set up a transaction subtype for the activity. For example, shipping a computer board to replace another computer board both of which are tracked by the installed base.

To enter the order line, the agent enters the item by inventory number and then enters the instance number of the item that is being replaced.

The agent does not enter the instance number for the part to be shipped because the actual instance is selected when the order is picked. At that time the instance information is entered into Oracle Install Base.

This case assumes that you do not care about the true disposition of the part being returned as the customer's installed base instance for that part is updated at the time the replacement part is shipped, not after the part is received from the customer.

Setup

- The activity must be of type order
- Setup of Transaction Subtype required
- Leave the Source region blank.
- In the Non Source region:
 - Select the Reference Required check box.
 - Optionally select a new owner for the part being replaced
 - Optionally select the new status for the part being replaced

Case #3: Ship a tracked item as a replacement when the replaced instance may not be known

This case is identical to Case #2 except that it does not require the agent to enter the instance number for the item being replaced. For example, an organization may ship a replacement mother board to fix problems with one of the computers a customer owns without necessarily knowing which instance is being fixed.

The agent enters the inventory number of the item to be shipped. Entry of the instance is optional.

The new part is added to the installed base record at the time the replacement item is picked and shipped from within Oracle Order Management. The part being replaced remains unchanged if the agent did not enter instance information.

Setup

- The activity must be of type order
- Setup of Transaction Subtype required
- Leave the Source region blank.
- In the Non-Source Info region, leave the Reference Req'd check box unselected. Optionally, populate the other fields.

Case # 4: Return of a part not tracked by Oracle Install Base.

If agents use the activity to record that a customer is authorized to return a part not tracked by the install base, a disposable part such as a printer cartridge, for example, then you do not need to set up the activity as an Oracle Install Base transaction subtype.

The Item list of values (LOV) includes all of the inventory items not tracked by Oracle Install Base that are available for the service activity the agent has entered.

The Instance field is disabled. The Serial Number field is enabled but not required. This permits agents to record the return of serialized parts not in a customer's installed base.

Setup

- Activity must be of type return
- Setup of Transaction Subtype not required

Case #5: Return of a part tracked by Oracle Install Base

This case handles an activity of type return of an item in a customer's installed base.

To record a return, the agent must enter the item number of the part being returned using the Item LOV and then also enter its installed base instance number.

The customer's installed base records are updated in Oracle Install Base after the part is received.

Setup

- Activity must be of type return
- Setup of Transaction Subtype required
- Set up the Source Info region:
 - Select the Reference Req check box
 - Optionally select the Change Owner check box and select Internal from the Change Owner To drop-down list.
 - Optionally enter a new status for the returned part in the Status field.
- Leave the Non-Source Info region blank.

5.5 Setting Up Items in Oracle Inventory

Use this procedure as a guideline for:

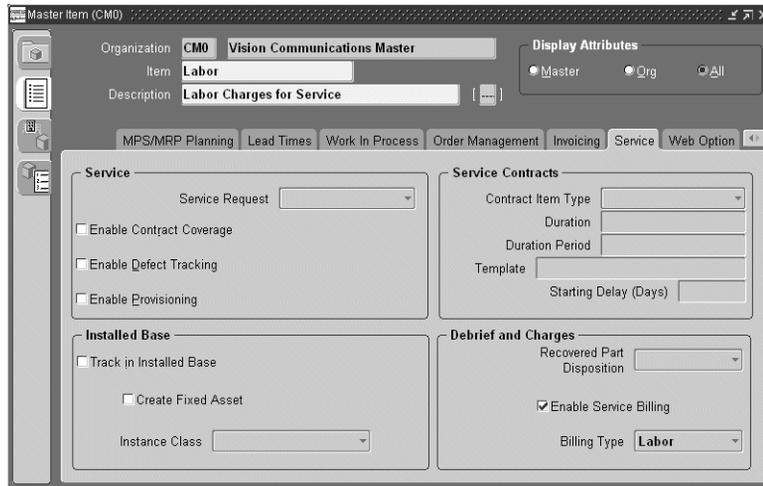
- Verifying that existing items are set up correctly for service applications. For example, you must classify items by billing type on the Service tab of the Item Master window.
- Setting up new inventory items used for billing customers for services, for example, different labor overtime rates.

Prerequisites:

- You must know the inventory organization for setting up your items. This is the organization selected in the system profile option Service: Validation Inventory Organization.
- The billing type must be set up if you are not using one of the seeded billing types.

To set up inventory items:

1. Navigate to Setup > Oracle Order Management > Items > Master Items.
The Organizations list of values window appears.
2. Select the Inventory organization in profile option ASO: Product Organization.
The Master Items window appears.
3. Follow the steps described in *Oracle Inventory User Guide* to set up your items or verify that existing items have been set up correctly. The following entries and settings are important for service applications:
 - Main Tab
 - * Enter item name and description in the Item and Description fields.
 - * Entries in the Unit of Measure region are used as the default units of measure in Charges.
 - Inventory Tab
 - * Inventory Item check box: Select for all items.
 - * Stockable check box: Select for tangible inventory items only. Leave unselected for labor and expense items.
 - * Transactable check box: Select for all items.
 - Order Management Tab
 - * Customer Orders Enabled check box: select for all items.
 - * Shippable check box: Select for physical items. Leave unselected for labor and expense items.
4. Select the Service Tab.



5. In the Service Region, make one or more of the following optional entries:
 - If you wish to make it possible for agents to create service requests for this item, then select Enabled from the Service Request drop-down list.
 - To make it possible to apply service contracts for this item, select the Enable Contract Coverage check box. You must also select Track in Installed Base check box before you can apply service contracts to it.
 - Select Enable Defect Tracking only if your organization uses Oracle Quality Online.
 - Select Enable Provisioning if this item can be delivered through electronic fulfillment by the Oracle Service Fulfillment Manger (SFM).
6. In the Installed Base region, make one or more of the following optional entries:
 - Select the Track in Installed Base check box if you wish to track this item via Oracle Install Base.
 - If you have selected the Track in Installed Base check box, then you can select the Create Fixed Asset check box to create a depreciable inventory asset used in Oracle Enterprise Install Base. See Oracle Enterprise Install Base documentation for more information.
7. In the Debrief and Charges region:
 - a. Select the Enable Service Billing check box.

- b. Use the Billing Type drop-down box to select a billing type for the item. Selecting a billing type makes it possible for agents to enter the item in the Task Debrief (Oracle Field Service) and the Charges tab (Oracle TeleService). It also makes it possible for you to define discounts for the item in Oracle Service Contracts.

Note: The Recovered Part Disposition drop-down box is reserved for future use by Oracle Spares Management.

8. Leave the Service Contracts Region blank. This region is used for creating contracts as inventory items. Specifying a Billing Type for an inventory item means that the item can be covered by a contract.

Guidelines

The tables below provide you with guidelines for Item Master setups for the three possible types of inventory items: parts, labor, and expenses.

Main Tab

Type of Inventory Item	Name	Unit of Measure
Part	Entry Required	Entry Required
Labor	Entry Required	Entry Required
Expense	Entry Required	Entry Required

Inventory Tab

Type of Inventory Item	Inventory Item check box	Stockable check box	Transactable check box
Part	Selected	Selected	Selected
Labor	Selected	Unselected	Selected
Expense	Selected	Unselected	Selected

Order Management Tab

Type of Inventory Item	Customer Orders Enabled check box	Shippable check box
Part	Selected	Selected
Labor	Selected	Unselected
Expense	Selected	Unselected

Service Tab (Service Region)

Type of Inventory Item	Service Request drop-down list selection	Enable Contract Coverage check box	Enable Defect Tracking check box
Part	Enabled	Selected	Select only if your organization uses Oracle Quality Online.
Labor	Enabled	Unselected	Unselected
Expense	Enabled	Unselected	Unselected

Service Tab (Installed Base region)

Type of Inventory Item	Track in Install Base check box	Create Fixed Asset check box
Part	Enable this check box if the item is to be tracked by Oracle Install Base.	Select only if you selected the Install Base Tracking check box and the item is a depreciable asset in Oracle Enterprise Install Base.
Labor	Unselected	Unselected
Expenses	Unselected	Unselected

Service Tab (Debrief and Charges region)

Type of Inventory Item	Enable Service Billing check box	Billing Type drop-down list
Part	Selected	Select a billing type
Labor	Selected	Select a billing type
Expense	Selected	Select a billing type

References

Oracle Inventory User's Guide

5.6 Setting Up Labor Schedules for Pricing Labor

Labor schedules determine what your organization charges for labor at different times. There are two places where you can define labor schedules: in Oracle Service Contracts (optional) and in Charges (required).

You must set up the default labor schedule in Charges for each business process as described in this procedure only if your organization is charging customers for labor using the Debrief window in Oracle Field Service or Oracle Depot Repair.

This setup is required because Debrief does not require agents to select the applicable labor item (the labor rate for the work performed).

This topic covers:

- How Charges Determines Labor Charges on page 5-25
- Setting Up the Labor Schedule in Contracts on page 5-26
- Setting Up the Default Labor Schedule on page 5-28

5.6.1 How Charges Determines Labor Charges

The application charges for Oracle Field Service labor in three steps:

1. Agents debrief labor in the Debrief window. Entry of the labor item (containing the applicable labor rate) is optional.
2. If the labor item is not specified, the application determines it based on:

- a. The labor schedule from the service contract selected for the charge line. This schedule is entered in the Oracle Service Contracts' Billing Rates window. See *Setting Up the Labor Schedule in Contracts* on page 5-26.
- b. The default labor schedule you create using the procedure described in *Setting Up the Default Labor Schedule* on page 5-28.

If the agent has worked across multiple time periods specified in a labor schedule, then the application creates multiple charge lines.

Suppose, for example, you create a labor schedule with regular time between 8 a.m. and 4:59 p.m.; overtime to be between 5 p.m. and 7:59 p.m.; and double time after 8 p.m. If an agent reports they have worked between 4 p.m. and 9 p.m., then the application creates three charge lines for the customer: one hour of regular time, three hours of overtime, and one hour of double time.

3. The application determines the price.

The price can be based on the price list alone or, if a contract is specified, in combination with a labor rate. A labor rate modifies or overrides the price list price: you can either specify a percent over or under the price list price or a flat currency amount which overrides the price list price. The labor rate pricing is available only when there is a contract specified for the charge line.

The concurrent program CSF: Update Debrief Lines creates the charge lines from debrief lines when a task assignment status is changed to Completed, Closed, Cancelled, Rejected, or On Hold.

For charges lines entered directly in the service request and in Oracle Depot Repair, the application looks up the price directly as described in step 3 above.

5.6.2 Setting Up the Contract Labor Schedule

If your organization uses Oracle Service Contracts together with Charges, then you can set up a labor schedule in each contract.

The steps below provide a guideline for entries important to Charges only. Refer to *Oracle Service Contracts Concepts and Procedures* for more details about this and other contracts-related setups.

Guidelines for setting up the labor schedule:

1. Under the Contracts Manager Responsibility, navigate to Launch Contracts.
2. If you wish to set up the labor schedule in a single contract, then:

- a. Select the contract you wish to set up and display it in the Service Contracts Authoring window.
- b. Select the Lines Tab.
- c. Select the Effectivities subtab.
- d. Select the service coverage item and click **Edit Coverage** in the Coverage Region.

The Service Contracts Coverage window appears.

- e. Select the Billing Types subtab.
 - f. Select the Business Process and the Service Activity Billing Type pair you wish to set up. The Billing Type must have the Billing Category of Labor.
 - g. Click **Billing Rates** to display the Billing Rates window.
3. If you are setting up the labor schedule for a contract template, then navigate to the Billing Rates window following the instructions in *Oracle Service Contracts Concepts and Procedures*.

The screenshot shows the 'Billing Rates' window with the 'Service Activity Billing Type' subtab selected. The 'Name' field is 'Charges Labor Transaction-Labor-Labor', 'Up To Amount' is '1000.00', and '% Covered' is '10.00'. The 'Regular' tab is active, and the 'Monday' column is selected. The table below shows labor charges for different times and days.

Start Time	End Time	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Labor Item	Description	Bill Rate	Flat Rate	UOM	%Over List Price
08:00	17:00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Labor	Labor Charges for				
17:00	20:00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Labor	Labor Charges for				
20:00	23:59	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Labor	Labor Charges for				

4. If you are pricing labor based on labor inventory items, then, on the Regular tab, set up the labor charges for different days and times as follows:

Note: Make sure the start and end times do not overlap.

- a. Enter the start and end time for the rate.
- b. Select the days this rate is applicable using the check boxes for the days of the week.

- c. Select the labor item to be applied for this time period using the Labor Item LOV.
 - d. Leave the rest of the fields blank.
5. If you wish to use the labor rates in the contract to override or modify the price, then, on the Regular tab, set up the labor charges for different days and times as follows:

Note: Make sure the start and end times do not overlap.

- a. Enter the start and end time for each rate.
 - b. Select the days this rate is applicable using the check boxes for the days of the week.
 - c. Select the labor Inventory item using the Labor Item LOV.
 - d. Use the Bill Rate LOV to enter the bill rate. The list of values is based on a lookup.
 - e. If you wish to specify a price for this rate, then enter the currency amount in the Flat Rate field and select a unit using the UOM LOV. Do not make any entries in the %Over List Price field. This price you enter here overrides the price list price for this contract.
 - f. If you wish to specify a discount or a surcharge for this rate, then enter a positive or a negative percentage in the %Over List Price field. A positive number increases the rate an agent enters. A negative number decreases the amount. Do not make any entries in the Flat Rate or UOM fields.
6. Repeat the entries you made on the Regular tab on the Holiday tab to set up the holiday rates.
7. Click **OK** to save and close the window when you are done.

5.6.3 Setting Up the Default Labor Schedule

Use this procedure to set up the labor schedule that is used by charges to supply a missing labor item when none is found in the customer contract or when there is no contract specified for the charge line. You must set up one default labor schedule for each business process.

To set up the time and material labor schedule for a business process:

1. Navigate to Setup > Charges > T&M Labor Schedule.

The Time & Material Labor Schedule window appears.

Start Time	End Time	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Labor Item	Item Description	Labor Rate
00:00	08:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Labor	Labor Charges for Service	Double Rate				
08:00	20:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Labor	Labor Charges for Service	Normal Rate				
20:00	23:59	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Labor	Labor Charges for Service	Overtime Rate				
00:00	23:59	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Labor 1	Labor item 1	Overtime Rate				
		<input type="checkbox"/>									
		<input type="checkbox"/>									
		<input type="checkbox"/>									
		<input type="checkbox"/>									
		<input type="checkbox"/>									

2. Use the Business Process LOV to select the service business process.
3. Specify the different labor times and their pricing. For each, line:
 - a. Enter the start and end times.

Note: Make sure that the start and end times of your entries do not overlap.

- b. Select the days the line is applicable using the check boxes for the days of the week.
- c. Select the labor item to be applied for this time period using the Labor Item LOV.
- d. If you are using labor rates in your contracts, then select a billing rate using the Labor Rate LOV.

Note 1: Labor Rate in this window is the same field as the Bill Rate field in the Contracts' Billing Rates window.

Note 2: You do not enter a currency rate (Flat Rate) or discount (% Over List Price) for the rate here, the application looks these up in a customer contract instead. Please see Oracle Service Contracts documentation for details.

4. Click **Save** in the toolbar.
5. Click **Validate Setup** to validate your entries.

If your entries do not overlap and the coverage is complete, then a check mark appears in the Validation Completed check box.

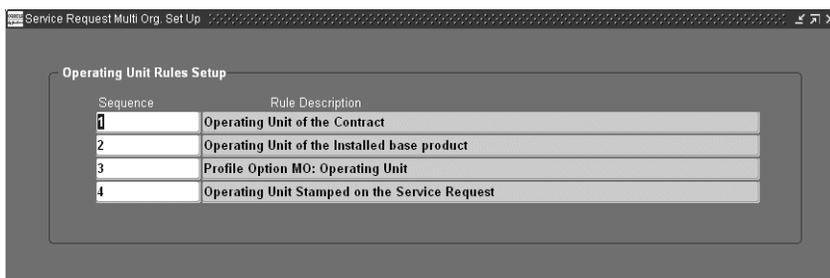
5.7 Setting Up Rules for Defaulting the Operating Unit

When agents enter a charge line, the application automatically supplies a default operating unit based on the rules you set up in this procedure. The operating unit is the financial entity used for billing and receiving payments from the customer.

To set up the rules for defaulting the operating unit:

1. Navigate to Setup > Charges > Multi Org Setup

The Service Request Multi Org Set Up window appears.



2. Enter the sequence in which you wish Charges to look for the value of the defaulted operating unit.

Rule Name	Description
Operating Unit of the Contract	If a contract is associated with the service request, then charges uses the operating unit of the contract.
Operating Unit of the Installed Base Product	If the service request concerns an Oracle Install Base item, then charges defaults the operating unit of the item.
Profile Option MO: Operating Unit of the Charge	Charges uses the operating unit selected in this profile.
Operating Unit Stamped on the Service Request	Charges uses the operating unit associated with the service request.

The application defaults the first operating unit it finds. For example, if you enter the sequence of 1, 2, 3, 4, then the application first looks for the operating unit in a valid contract. If there is no contract available, then it checks to see if the service request is for an Oracle Install Base item, and so on.

3. Click **Save** on the toolbar to save your entries.

5.8 Creating Orders from Charges Across Operating Units

Many business processes cross operating unit boundaries, where there is a requirement for a function in one operating unit to create or update data in another operating unit.

If you would like to enable users to create orders in Order Management in an operating unit other than the one set in their MO: Operating Unit profile, you will need to set the context for the specific operating unit.

Setting up the Context for an Operating Unit

This setup is only required if your business requirement is to submit sales orders across organizations from Service Charges.

Charges uses the HRMS Organization Extra Information Type (EIT) Descriptive Flex Fields to define the contexts (User_id, Resp_id, and Resp_appl_id) for each operating unit.

The following procedure looks at a company that has set the MO: Operating Unit profile to **Vision Operations, USA**, for the Customer Support, Vision USA responsibility. The company would like to create order lines in **Vision Germany** using the Customer Support, Vision USA responsibility.

The following procedure shows what the company will need to do in order to setup the operating unit, **Vision Germany**.

Prerequisites:

Before doing this setup you will need to identify the organizations as well as the associated user and responsibility for which you would like to submit orders from Charges.

To setup Context for the chosen Operating Unit:

1. Navigate to HRMS Manager Responsibility, Work Structures > Organization.
2. Open the Description form.
3. In the Find window, query the name of your organization.(for example, Vision Germany)
4. Scroll down to find the Operating Unit Organization Classification.
5. Choose the Others Button.
6. Select User Context Variables from the List.
7. Tab to populate the DFF user context variables window.
8. Choose Product Family Function as Service Charges.
9. From the list of values, select a appropriate Application User.
10. From the list of values, select the Responsibility (for example, Order Management Super User, Vision Germany).
11. The Application is defaulted
12. Save your changes.

This setup should be repeated for all of the Operating Units that you plan to use.

Note : If you have more than one Business Group, change the responsibility associated with the other business group and continue defining your organization classification extra information.

5.9 Modifying the Display of Charges on Customer Invoices

Normally the customer receives an invoice detailing all of the individual items agents have entered as charges.

You can use this procedure to create an inventory item with a generic name, called a Rollup Item, to appear on customer invoices instead of the individual inventory items in a billing type. The roll-up item does not change what customers are charged, it affects only the name of the item printed on the invoice.

Suppose you have three different overtime labor items, Labor 1, Labor 2, Labor 3, all associated with the Labor billing type.

Normally, if the agent specifies the engineer worked for two hours at Labor 1 rate, three hours at the Labor 2 rate, and one hour at the Labor 3 rate, then the customer sees three items on the bill:

- Labor 1: 2 hours
- Labor 2: 3 hours
- Labor 3: 1 hour

By setting up a new inventory item Overtime Labor with the Labor billing type, and creating a roll-up item using the procedure below, the customer bill substitutes Overtime Labor for each of the lines:

- Overtime Labor: 2 hours
- Overtime Labor: 3 hours
- Overtime Labor: 1 hour

Note 1: The roll-up item you create does not summarize line items on an invoice. It only substitutes the generic roll-up item name for the item names for that billing type.

Note 2: You can use roll-up items for physical items but not for items that are shipped to or received from customers through Oracle Order Management.

Prerequisites

You must know the correct inventory organization

To set up an inventory item to modify the display of charges in customer invoices:

1. Navigate to Setup > Oracle Order Management > Items > Master Items and set up the replacement items you wish to appear on the customer invoice. See Setting Up Inventory Items on page 5-20.
2. Navigate to Setup > Charges > Billing Type Attributes.
The Billing Type Attributes window appears.

Billing Type	Billing Category	Start Date	End Date	Rollup Item	Description
Material	Material	13-AUG-2002		Material	Miscellaneous Material Charge
Expense	Expense	13-AUG-2002		Expense	Expense Charge for Service
Labor	Labor	13-AUG-2002		Labor	Labor Charges for Service

3. Use the Billing Type list of values (LOV) to select the billing type for the inventory items you wish to summarize.
4. Select the inventory item you wish to use as the roll-up item using the Rollup Item LOV.
5. Save your work.

5.10 Setting Up System Profiles

Use this general procedure to set up any of the Charges profiles.

To set up system profiles:

1. Navigate to Others > Profile System Values.
The Find System Profile Values window appears.
2. In the Profile field, enter the search criteria. For example, Service%charges%.
3. Click **Find**.

The profiles matching your search criteria appear in the System Profile Values window.

5.11 Setting Up Remaining System Profiles

Set up remaining Charges system profiles to control a different types of Charges behavior. This includes:

- Preventing Accidental Overrides of Charges Price Modifications on page 5-35
- Setting Up the Default Sort Order on the Charges Tab on page 5-35
- Defaulting the Service Request Business Process on page 5-36
- Specifying the LOV Type for Price List on page 5-36

5.11.1 Preventing Accidental Overrides of Charges Price Modifications

Agents using Oracle Order Management's Sales Order Line Items Pricing Tab can accidentally override prices entered in Charges when they select the Calculate Price check box. This causes prices to be recalculated for orders in the Entered state and overrides the prices entered in Charges by applying the modifiers associated with the price list.

To prevent this accidental price modifications:

1. Create a manual pricing modifier according to the procedures described in *Oracle Order Management User's Guide*.
2. Set the system profile Service: Manual Modifier to a modifier you have set up.

5.11.2 Setting Up the Default Sort Order on the Charges Tab

Agents can decide how to sort the charges displayed in the tab by making a selection from the Sort By drop-down list. You can set up the default value by setting the system profile Charges Default Sort Order to any one of the following:

- Billing Type
- Charge Line Source
- Charge Line Status
- Charge Line Type
- Creation Date

- Order Number
- Service Activity Code

By default, this system profile is set to Creation Date.

5.11.3 Defaulting the Service Request Business Process

Charges automatically defaults the business process from the service request into the charges lines when the system profile Service: Charges - Default Service Business Process from SR is set to Yes, the default seeded value. If you set this profile to No, the agent must always enter the business process manually.

5.11.4 Specifying the LOV Type for Price List

If your organization uses a large number of price lists, you can select to use the long list of values format by setting the system profile Service: Charges - Use Long List LOV for Price List to Yes. This forces agents to enter search criteria before displaying the list of values and thus improves performance. A setting of No, the seeded default, displays the short list of values format.

Automating Submission of Field Service Charges

This group of topics explains how to set up the application to automatically submit Oracle Field Service debrief charges to Oracle Order Management and bill customers. It covers:

- Overview of Automatic Charges Submission on page 6-1
- What You Can Modify on page 6-3
- Setting Up Rules to Restrict Automatic Submission on page 6-3
- Setting Up Automatic Submission on page 6-7

6.1 Overview of Automatic Charges Submission

You can set up the application to automatically submit to Oracle Order Management any Oracle Field Service charges agents have entered in the Oracle Field Service Debrief window.

There are two types of charge lines that can be created as a result of the Oracle Field Service debrief:

- **In Progress:** Debrief lines belonging to task assignment that are in one of five statuses: Completed, Closed, Cancelled, Rejected, or On Hold.
- **Actual:** Debrief lines belonging to task assignments not in any of the above five statuses.

The automatic submission process submits only charge lines of type Actual and only those resulting from Oracle Field Service Debrief.

These are lines created when an engineer creates a debrief line in the Debrief window and changes its Assignment Status to one of the five statuses: Completed, Closed, Cancelled, Rejected, or On Hold.

The automatic submission to Oracle Order Management is accomplished by running the Charges Autosubmission Concurrent Program.

The process does not submit:

- Estimates and pending charges (lines of type Estimate or In Progress)
- Charges entered in Oracle Depot Repair debrief
- Charges agents entered directly in the Charges tab of the Service Request Window
- Charge lines with errors

The submission process can fail if Oracle Order Management requires additional information not supplied by Charges, such as the entry of a sales person associated with the order, for example.

Agents can view any error messages provided by Oracle Order Management by clicking the Charge Line Status Details button in the Charges tab.

Agents can see if the line has been submitted by checking the Status field in the Charges tab of the Service Request window. The following table lists and describes the possible statuses:

Charge Line Status	Description
New	All charge lines start with this status including estimates and those in progress.
Submitted	The charge line has been successfully submitted either by the automatic submission concurrent program or by an agent clicking the Submit button or from Oracle Depot Repair.
For Review	The charge line has violated one of the restrictions rules set up during implementation. For example, you can set up a rule that bars the automatic submission of charges that are more than ten percent from the original estimate price. Agents can review lines of this type and submit them manually.
Failed	Automatic submission has failed because Oracle Order Management requires additional information. Agents must view the error message, supply the missing information, and submit the line manually.

6.2 What You Can Modify

There are several ways you can modify the automatic submission process. You can:

- Restrict charges from being automatically submitted and billed to customers.

You can set up one or more rules that bar charges from being submitted automatically. For example, you can prevent the application from automatically submitting charges to specific customers, or prevent any charges from being submitted if they exceed the estimated price by more than ten percent. See *Setting Up Rules to Restrict Automatic Submission* on page 6-3.

- Determine if you want Oracle Order Management to bill the customer automatically or if agents will have to book the order in Oracle Order Management.

Setting the system profile option *Service: Charges Book Order Automatically* to **Yes** creates orders with a status of *Booked*. The default setting of **No** keeps the orders in the *Entered* status.

- Specify at what stage you want to automatically submit charges

By setting the system profile *Service: Charges Auto Submit Mode*, you can have charges submitted individually any time charges are created, wait until all of the tasks are closed, or until the service request has been set to a final status.

- Determine the frequency with which charges are submitted by specifying the frequency of the concurrent program runs.

6.3 Setting Up Rules to Restrict Automatic Submission

This group of topics explains how you can set up rules that restrict which charges are submitted automatically.

Restriction Rules on page 6-3 describes the available rules. The other topics provide the procedures for setting them up:

- *Adding a Restriction Rule* on page 6-5
- *Updating a Restriction Rule* on page 6-6

6.3.1 Restriction Rules

This topic describes the different rules you can use to restrict the automatic submission of charges.

By default, the application includes one rule: the application does not submit charge lines if an agent has modified their pricing. (You can turn this rule off by entering an end date.)

The following table lists and describes the available restriction rules:

Rule	Description
Actuals Exceed Estimates	Limits automatic submission if the total service request charges fall within a percentage above the total estimated charges. You can specify only one rule of this type. The rule calculates the percentage based on the following formula $\frac{(\text{Total Actuals} + \text{Total In Progress} - \text{Total Estimates})}{\text{Total Estimates}} * 100$ If the service request contains charges in multiple currencies, each currency is evaluated separately.
Bill to Customer	Does not submit the charge line if the customer you specify is to be billed for the service. This restriction is based on the Bill To party. You can create multiple rules of this type to exclude specific customers from automatic billing.
Charge Line Amount	Each charge line must be below (or above depending on the operator you select) the amount you specify. The rule considers only the charge lines for the currency you specify as it does not perform any currency conversions. You can create multiple rules of this type, one for each currency.
Exclude Manually Overridden Charges	By default, the application does not submit charge lines modified by agents. You have the option of turning this rule off by entering an end date.
Service Request Type	Prevents charges belonging to service requests of a particular type from being automatically submitted. You can create multiple rules of this type.
Total Service Request Charges	Total charges for the service request must be below (or above depending on the operator you select) the currency amount you specify. You can create only one rule of this type per currency.

6.3.2 Displaying Current Restriction Rules

Use this procedure to set up rules that restrict the automatic submissions of charge lines.

To display current restriction rules:

1. Navigate to Setup > Charges > Autosubmit Restrictions.

A browser window displays the Autosubmit Restrictions page listing the current restriction rules.

ORACLE

Diagnostics Close Window Preferences

Autosubmit Restrictions
Define conditions under which Field Service charges will not be submitted automatically.

Create Restriction

View

Restriction Type	Condition Value	Currency	Start Date	End Date	Update
Bill to Customer	= AT&T Universal Card		16-Dec-2003		
Bill to Customer	=		16-Dec-2003		
Bill to Customer	=		16-Dec-2003		
Charge Line Amount	= 1299	USD	23-Dec-2003	23-Dec-2003	
Exclude if Manually Overridden			23-Dec-2003		
Service Request Type	= Depot Repair		23-Dec-2003	23-Dec-2003	
Total Service Request Charges	> 1000	USD	23-Dec-2003	23-Dec-2003	

2. If you wish to add a rule, then select the rule type from the Create Restriction drop-down list and click **Go**. For details see Adding a Restriction Rule on page 6-5.
3. If you wish to update a rule, then click **Update** to the right of the rule. For details, see Updating a Restriction Rule on page 6-6.

6.3.3 Adding a Restriction Rule

Use this procedure to add a restriction rule.

To add a restriction rule:

1. Display the Autosubmit Restriction page.
2. Select the rule type from the Create Restriction drop-down list and click **Go**.

The application displays a different entry page depending on the rule you wish to add. The table below explains the different entries you can make depending on the rule you have selected:

Rule	What you enter:
Actuals Exceed Estimates	Enter a percentage (without the percent sign) in the Value(%) field.
Bill to Customer	Enter the customer in the Value field using the list of values.
Charge Line Amount	<ol style="list-style-type: none"> 1. Enter the operator using the Condition drop-down list 2. Enter the amount. 3. Select the Currency using the list of values.
Exclude Manually Overridden Charges	You can turn this rule off by entering an end date.
Service Request Type	Enter the Service Request Type in the Value field using the list of values.
Total Service Request Charges	<ol style="list-style-type: none"> 1. Enter the operator using the Condition drop-down list 2. Enter the amount. 3. Select the Currency using the list of values.

3. Click **Apply**.

The new rule appears in the Autosubmit Restrictions page.

6.3.4 Updating a Restriction Rule

Use this procedure to update an automatic submission restriction rule.

To update a restriction rule:

1. Display the Autosubmit Restriction page.
2. Click **Update** to the right of the rule.

The application displays a different entry page depending on the rule you wish to update. The table below explains the different entries you can make depending on the rule you have selected:

Rule	What you can update:
Actuals Exceed Estimates	<ul style="list-style-type: none"> ■ Enter a new percentage (without the percent sign) in the Value(%) field ■ Disable the rule by entering an end date.

Rule	What you can update:
Bill to Customer	<ul style="list-style-type: none"> ▪ Enter a different customer ▪ Disable the rule by entering an end date.
Charge Line Amount	<ul style="list-style-type: none"> ▪ Enter a different operator using the Condition drop-down list ▪ Modify the amount. ▪ Select a different Currency using the list of values.
Exclude Manually Overridden Charges	Turn this rule on and off by entering or removing dates.
Service Request Type	<ul style="list-style-type: none"> ▪ Enter a different Service Request Type in the Value field using the list of values. ▪ End-date the rule.
Total Service Request Charges	<ul style="list-style-type: none"> ▪ Enter a different operator using the Condition drop-down list ▪ Modify the amount. ▪ Select a different Currency using the list of values. ▪ End-date the rule.

3. Click **Apply**.

You are returned to the Autosubmit Restrictions page.

6.4 Setting Up Automatic Submission

Use this procedure to set up the automatic submission of Oracle Field Service charges entered by agents in debrief to Oracle Order Management.

To set up the automatic submission of charges:

1. Set up any restrictions for submitting charges. See Setting Up Rules to Restrict Automatic Submission on page 6-3.
2. Navigate to Setup > Others > Profile System Values and set the following system profiles at the site level:
 - Service: Charges Book Order Automatically
Set to **Yes** if you wish to automatically create orders in Oracle Order Management with a status of Booked.

The default setting of **No** keeps the orders in the Entered status. The order must be booked before the customer is billed.

- **Service: Charges Autosubmit Mode**

This system profile determines at what stage the charges are submitted. You can set this profile to:

- * **When All Tasks Final**

This mode submits charges when all of the tasks have reached a status designated as Closed. If the automatic submission process fails for any charge line associated with the service request, none of the lines are submitted.

- * **When Service Request Final**

Submits charges when the service request is set to a status designated as Final. If the automatic submission process fails for any charge line associated with the service request, none of the lines are submitted.

- * **As Available**

Charges are submitted after the Oracle Field Service concurrent program creates them from debrief. If any line encounters errors, all subsequent charge lines for that service request are not submitted.

3. Run the Charges Autosubmission Concurrent Program with the frequency you desire. To run the program, navigate to Setup > Others > Submit Requests.

Integrating Relationship Plans in Other Applications

This appendix details the necessary steps involved in integrating any application within the Oracle E-Business Suite to the relationship plans functionality offered by Oracle TeleService. Integration can be achieved by coding one or more of the following form level triggers in the integration form:

- On Insert
- On Update
- Custom1
- Custom2

A.1 Overview of Integrating Relationship Plans

Modules within the CRM application need to be integrated with each other to ensure smooth flow of data and business logic through out the application. The relationship plans module within Customer Care allows organizations to set up plans that they can offer to their customers and ensure a constantly growing customer base.

The relationship plans module is a busy point of integration, because of the very fact that almost every other module within CRM needs to have a consistent view of all the existing plans in the application. To help in this integration process, the relationship plans module facilitates an "ENABLE PLAN" form, which enables other modules to integrate with relationship plans.

A.2 Technical Overview

A.2.1 Forms Used:

CSCUTILS.fmb - Setup Form and Outcomes Window

A.2.2 Tables Used:

CSC_PLAN_ENABLE_SETUP

OKC_PROCESS_DEFS_V

A.2.3 List of Packages and Procedures:

```

PACKAGE CSC_PLAN_OUTCOMES
PROCEDURE GET_OUTCOMES (
  p_FUNCTION_ID                NUMBER,
  p_TRIGGER_EVENT              VARCHAR2,
  p_PARTY_ID                   NUMBER,
  p_CUST_ACCOUNT_ID            NUMBER,
  p_END_USER_TYPE              VARCHAR2 := NULL
  p_APPLICATION_SHORT_NAME     VARCHAR2,
  p_MSG_TBL                    OKC_AQ_PVT.MSG_TAB_TYP)
    
```

Description of Parameters:

- P_FUNCTION_ID - The integrating form function id from table FND_FORM_FUNCTIONS
- P_TRIGGER_EVENT - The triggering event that calls the outcomes. The allowed values are INSERT, UPDATE, CUSTOM1, and CUSTOM2.
- P_PARTY_ID - Party Id from HZ_PARTIES.
- P_CUST_ACCOUNT_ID - Customer account Id from HZ_CUST_ACCOUNTS_ALL
- p_END_USER_TYPE - The end user type. AGENT or CUSTOMER
- P_APPLICATION_SHORT_NAME - The short name of the application from FND_APPLICATION.
- P_MSG_TBL - The msg_tbl has the following structure:
 - a. ELEMENT_NAME VARCHAR2 (4000)
 - b. ELEMENT_VALUE VARCHAR2 (4000)

The element name is the name of the action attribute element name. The element value is the actual value of the element name.

A.3 Prerequisites

1. Relationship Plans have to be defined and attached to the specific customer.
2. Actions, Conditions, and Outcomes have to be defined using the Events screens.

A.4 Steps to Enable Modules in Relationship Plans

1. Register the integrating module form with the relationship plan's setup form.
2. Attach library `CSCUTILS.pll` (from `$CSC_TOP/resource`) in the integrating form.
3. Subclass `relationship_plans_outcomes` and `enable_relationship_plans` object groups from the `CSCUTILS.fmb` form (from `$CSC_TOP/forms/US`).
4. Call `CSC_PLAN_OUTCOMES.GET_OUTCOMES` procedure from all of the above mentioned form level triggers. The outcomes are fired only for triggers that are enabled in the setup form.
5. Add the following code to the `APP_CUSTOM` package body in the integrating form:

```
if (wnd='OUTCOMES') then
  cscutils_app_custom.close_windo('OUTCOMES');
  --move focus to required block/field. for eg:
  GO_BLOCK('target block');
end if;
```

6. User defined triggers, Custom1 and Custom2 have to be explicitly executed from the required integration point. Following is an example:

```
execute_trigger('CUSTOM1');
```

A.5 Functionality of the Setup Form - CSCUTILS

A.5.1 Enable Relationship Plans - Setup Window:

To enable a module for relationship plans, the module should register its form functions with the relationship plans registering table called `CSC_PLAN_ENABLE_SETUP`. This can be done via the Enable Relationship Plans - Setup form.

The Function column specifies the integrating form function name.

The Application column specifies the application the form function belongs to.

The integrating module has four form level triggers which can be coded to achieve integration with the relationship plans module. They are:

1. On Insert
2. On Update
3. Custom1
4. Custom2

By checking one or more of these triggers, the enable plan APIs can be executed from the integrating module.

A.5.2 Outcomes Window

Outcomes of a plan can be of two types - synchronous and asynchronous.

Asynchronous outcomes are those that are fired immediately but the resulting outcomes are processed in the background. Synchronous outcomes are those which are fired immediately and the results are shown in the outcomes window. The user can then select or deselect the outcomes and execute them.

Outcome Name is the name of the outcome.

Outcome Type is the name of the outcome type, such as Alert or Script.

Description is the description of the outcome, such as the alert text for alerts.

The Execute button executes the outcome.

The Cancel button closes the Outcome window.

A.5.3 Defining an Alert

1. Create a message with the alert text as the message text. This is the same as defining an error message.
2. Define the outcome in the Process Definition screen. Use the same message name defined in step 1 for the outcome name.
3. Define the parameters for the outcomes. Use the same message token names defined step 1 as the parameter names.
4. For more information about defining outcomes, refer to Events documentation.

A.6 Limitations

Defining a plan which has only one outcome to be fired raises no issues. The outcome is fired and the control passes on normally to the next logical step. If there are two or more outcomes to be fired, the control passes to the 'OUTCOMES' block which lists the different outcomes and the user can select which of the outcomes are to be executed. This raises a potential error situation if the enable relationship plans triggers are called from triggers that do not allow restricted procedures to be part of their code. This is due to the fact that there is a 'GO_BLOCK' statement executed in the GET_OUTCOMES program unit when transferring control to the OUTCOMES block to display the various outcomes.

You must make sure that the form functions integrating with the Relationship Plans module takes into account the above situation and performs the right code calls. A workaround for the above scenario would be to create a timer and then execute the Enable Relationship plan trigger from the 'WHEN-TIME-EXPIRED' trigger.

Frequently Asked Questions About Setting Up Relationship Plans

What does Plan Type mean?

Relationship Plans can be of two types:

- Template Plan - These types of plans can be associated to any customer.
- Customized Plan - This type of plan is created only for specific customers.

Can a customized plan be created when the Define Relationship Plan responsibility is invoked?

No, a customized plan can be created only when a plan already exists and is associated to a group of customers. This plan can then be customized for a specific subgroup of those customers. When a plan is customized, a new plan is created in the application.

What is the Account Level check box in the Define Plan form?

Plans can be associated to customers at two levels.

- Party Level, in which case this check box is left unchecked. Party Level plans can be associated to customers only at party level. This means the plan is associated to all the customer accounts as well.
- Account Level, in which case this check box is checked. Account Level plans can be associated to customers only at account level. This means the plan is associated to a specific account of the customer and not to all the accounts.

What is the Group Name field in the Define Plan form?

Plans can be grouped together to form a logical set of plans. This group of plans can then be associated to customers and the customer gets the benefits and outcomes of

all the plans in the group. This functionality is not yet implemented in the current release.

**Sometimes the Low Value and High Value values cannot be modified.
Why is this?**

These fields define the Relationship Plan header criteria. For example, consider the following Plan definition:

Open Service Requests > 5

This plan will be associated to customers who have more than five open service requests. Assume that Customer A has eight open service requests. If you try to modify the plan criteria so the high value is 10 instead of 5, this will not be allowed because Customer A, who has eight open service requests is already associated to the plan and would not satisfy the new plan criteria.

This update is allowed in the following scenarios:

- The plan is not associated to any customers.
- The new plan criteria does not violate any of the existing customer-plan associations.

The Relationship Plan is setup and the customer is associated to the plan, but the plan does not execute.

Relationship Plans are currently integrated with the Contact Center and Service Request forms. No other form can execute plans. If the plan is failing to execute from these two forms, check the following:

Navigate to Customer Support > Setup > Relationship Plans > Enable Relationship Plans and verify if the following entries exist and that the Custom1 check box is checked:

Function	Application
CSCCCCRC	Customer Care
CSXSRISR	Oracle Service

How do I set up Relationship Plans to pop up an alert?

In this example, we are creating a new message called RV30 and specifying the message text that needs to pop up in the alert window.

1. Navigation Path: Application Developer > Messages

-
2. Define an action called RV30 with the following attributes:
 - Action Type = Action Based
 - Correlation = CUSTOMER_RV30
 - Check the Enabled and Allow Synchronous Outcomes check boxes.
 - Name = CUSTOMER NAME
 - Element = CUST_NAME
 - Navigation Path: Customer Support > Setup > Relationship Plans > Events > Define Actions
 3. Define a Process Definition (Outcome) called RV30 with the following attributes using this navigation path:

Customer Support: Setup > Relationship Plans > Events > Define Process Definition

 - Purpose = "OUTCOME"
 - Type = "ALERT"
 - Name = "CUST_NAME"

The process definition name should be the same as the message name).
 4. Define a relationship plan called RV30. The plan header criteria is 'Open Service Request > 10'. The navigation path is Customer Support: Setup > Relationship Plans > Define Relationship Plans
 5. In the Plan Details tab, create a new condition called RV30 using the action called RV30 and outcome RV30.
 6. Click Parameters. In the Parameters window, right click and select 'Populate selected rows in parameters'. Invoke the list of values to populate the value for the Action Attribute field.
 7. Attach the plan to the customer. In the Relationship Plans Search Screen, search for the customer to which the plan is to be attached.
 8. Click **OK** to invoke the Plans Summary window.
 9. Click **Add/Remove** to invokes the Add/Remove Plans window. This window displays all the plans the customer can be associated to. Select RV30 to add the plan called RV30 to the customer.
 10. Open the Contact Center window and query the Customer. The Plan's alert message should pop up.

What manuals are available that describe Relationship Plans?

- *Oracle TeleService Implementation Guide*
- *Oracle TeleService User Guide*
- *Oracle Service Contracts Concepts and Procedures*

Why do extra outcomes sometime fire?

The same action is being used in multiple conditions.

Seed Data for Relationship Plans

The Expiring Contracts relationship plan is included with this release. This relationship plan is designed to display an alert when an agent views a record of a customer who has one or more contracts that will expire in the next 30 days.

Note: Do not modify seed data. Seed data is provided for you to use as delivered. If you want to make modifications, please make a copy and modify your copy.

This appendix describes the following:

- Relationship Plan Header
- Condition Header
- Condition Type
- Outcome
- Parameter
- Outcome Header
- Outcome Argument
- Message Definition
- Profile Definition
- Action Header
- Action Attributes

Relationship Plan Header

- Plan Name - Expiring Contracts
- Plan Type - Template
- Description - Plans that display an alert when querying a customer who has one or more contracts that will expire in the next 30 days
- Profile Check - Expiring Contracts
- Operator - >
- Low Value - 0

Condition Header

- Condition Name - Customer Care - Condition for Expired Contracts.
- Description - Seeded condition for Relationship Plans.

Condition Type

Action - Customer Care - Generic Action

Outcome

CSC_EXPIRING_CONTRACTS

Parameter

- Parameter - CUST_PARTY_NAME
- Description - Name of the customer who has one or more contracts that will expire in the next 30 days.
- Data Type - CHAR
- Action Attribute - CUST_PARTY_NAME

Outcome Header (Process Definition)

- Name - CSC_EXPIRING_CONTRACTS
- Application - Oracle Customer Care
- Description - Outcome that will be fired when a customer has one or more contracts that will expire within the next 30 days. An alert message will pop up warning the agent about this.
- Purpose - Outcome

-
- Type - Alert
 - Comments - Outcome for a relationship plan that fires when a customer has one or more contracts that will expire in the next 30 days.

Outcome Argument

- Name - CUST_PARTY_NAME
- Data Type - Char
- Description - Name of the customer who has one or more contracts that will expire in the next 30 days.

Message Definition

Message Name - CSC_EXPIRING_CONTRACTS

Message Tokens - CUST_PARTY_NAME

Message Description - Message used as an outcome in a Relationship Plan that fires when a customer has one or more contracts that will expire in the next 30 days.

Message Text - Customer &CUST_PARTY_NAME has one or more contracts that will expire in the next 30 days.

Profile Definition

Block:

- Name - Expiring Contracts
- Code - EXPIRINGCONTRACTS
- Description - Number of contracts that will expire in the next 30 days.
- Application - Oracle Customer Care
- Select - count(*)
- From - OKS_ENT_HEADERS_V A
- Where - (a.party_id =:party_id and:cust_account_id is null) and a.end_date_active <= sysdate + 30

Check

- Name - Expiring Contracts
- Code - EXPIRINGCONTRACTS

-
- Description - Number of contracts that will expire in the next 30 days.
 - Application - Oracle Customer Care
 - Type - Variable
 - Variable - Expiring Contracts

Action Header

Action Name - Customer Care - Generic Action

Action Type - Action Based

Description - Customer Care generic action that has all the attributes from the contact center header region as well as some from SR, that can be used as additional condition or as arguments to an outcome.

Correlation - CUSTOMER_CARE_ACTION

Application - Oracle Customer Care

Enable - Yes

Counter Action - No

Allow Synchronous Outcomes - Yes

Action Attributes

The following is a list of the Action Attribute Name, Element Name, Description and Data Type for the attributes provided with the seeded Action named Customer Care - Generic Action.

- Customer Party Id, CUST_PARTY_ID, Customer Party Id, NUMBER
- Customer Party Number, CUST_PARTY_NUMBER, Customer Party Number, CHAR
- Customer Name, CUST_PARTY_NAME, Customer Party Name, CHAR
- Customer Type, CUST_PARTY_TYPE, Customer Party Type, CHAR
- Customer Status, CUST_PARTY_STATUS, Customer Party Status, CHAR
- Customer Account Id, CUST_ACCOUNT_ID, Customer account Id, NUMBER
- Contact Party Id, CONT_PARTY_ID, Contact Party Id, NUMBER
- Contact Party Number, CONT_PARTY_NUMBER, Contact Party Number, CHAR

-
- Contact First Name, CONT_FIRST_NAME, Contact First Name, CHAR
 - Contact Last Name, CONT_LAST_NAME, Contact Last Name, CHAR
 - Area Code, AREA_CODE, Area Code, CHAR
 - Phone Number, PHONE_NUMBER, Phone Number, CHAR
 - Extension, EXTENSION, Extension, CHAR
 - E-mail Address, EMAIL, E-mail Address, CHAR
 - Address, ADDRESS, Address, CHAR
 - City, CITY, City, CHAR
 - State, STATE, State, CHAR
 - Postal Code, POSTAL_CODE, Postal Code, CHAR
 - Province, PROVINCE, Province, CHAR
 - Country, COUNTRY, Country, CHAR
 - Caller Type, CALLER_PARTY_TYPE, Caller Type, CHAR
 - Caller Status, CALLER_PARTY_STATUS, Caller Status, CHAR
 - Category Code, CATEGORY_CODE, Category Code, CHAR
 - Country Code, COUNTRY_CODE, Country Code, CHAR
 - Contact Relation, CONTACT_RELATION, Contact Relation, CHAR
 - Contract Id, CONTRACT_ID, Contract Id, NUMBER
 - Contract Line Id, CONTRACT_LINE_ID, Contract Line Id, NUMBER
 - Critical Overridden Flag, CRIT_OVERRIDE_FLAG, Critical Overridden Flag, CHAR
 - Relation Meaning, RELATION_MEANING, Relationship code meaning, CHAR
 - Account Number, ACCOUNT_NUMBER, Account Number, CHAR
 - Contract Number, CONTRACT_NUMBER, Contract Number, NUMBER
 - Contract Line Number, CONTRACT_LINE_NUMBER, Contract Line Number, NUMBER

D

Service Request Lookup Codes

This appendix lists the lookup types and codes for the Service Request modules of Oracle TeleService. The following table lists lookups for service requests:

Lookup Type	Lookup Code	User Extensible	Meaning	Description
CSY_PERIODS	-	N	Period Types Used in Embedded Analytics	Period Types Used in Embedded Analytics
-	LAST_30_DAYS	-	Last 30 Days	-
-	LAST_365_DAYS	-	Last 365 Days	-
-	LAST_7_DAYS	-	Last 7 Days	-
-	LAST_90_DAYS	-	Last 90 Days	-
-	TODAY	-	Today	-
CSY_PROMPTS	-	N	Prompts used in service core embedded analytic components	Prompts used in service core embedded analytic components
-	ALL	-	All	-
-	CRIT_CUST_SR	-	Critical Customer Requests	-
-	DAYS	-	days	-
-	HOURS	-	hours	-
-	MINS	-	mins	-
-	MTT_RSLV	-	Mean Time to Resolve	-

Lookup Type	Lookup Code	User Extensible	Meaning	Description
-	MTT_RSPND	-	Mean Time to Respond	-
-	PERCENT	-	%	-
-	PROB_CODE	-	Problem Code	-
-	PROD_CODE	-	Item Code	-
-	RESL_CODE	-	Resolution Code	-
-	SEV_1_SR	-	Severity 1 Requests	-
-	SR_IN_JEOPARDY	-	In Jeopardy Requests	-
-	SR_RSLTN_QLTY	-	Request Resolution Quality	-
-	SR_RSLVD_PER_AGT	-	Request Resolved Per Agent	-
CS_BILLING_CATEGORY	-	N	Service Billing Category	Billing Category for Billing Types
-	E	-	Expense	Expense
-	L	-	Labor	Labor
-	M	-	Material	Material
CS_CHG_LINE_STATUS	-	N	Service Charges Line Status	List of Service Charges Line Statuses
-	FOR_REVIEW	-	For Review	For Review
-	IN_ERROR	-	Failed	Failed
-	NEW	-	New	New
-	SUBMITTED	-	Submitted	Submitted
CS_CHG_LINE_TYPE	-	N	Service Charge Line Type	List of Service Charge Line Types
-	ACTUAL	-	Actual	Actual
-	ESTIMATE	-	Estimate	Estimate
-	IN_PROGRESS	-	In Progress	In Progress
CS_CHG_SORT_ORDER	-	N	Service Charge Sort Order	List of columns that can be used to sort charge lines for UI

Lookup Type	Lookup Code	User Extensible	Meaning	Description
-	BILLING_TYPE	-	Billing Type	Billing Type
-	CHARGE_LINE_SOURCE	-	Charge Line Source	Charge Line Source
-	CHARGE_LINE_TYPE	-	Charge Line Type	Charge Line Type
-	CREATION_DATE	-	Creation Date	Creation Date
-	LINE_STATUS	-	Charge Line Status	Charge Line Status
-	ORDER_NUMBER	-	Order Number	Order Number
-	TRANSACTION_TYPE	-	Service Activity Code	Service Activity Code
CS_CREDIT_CARD_TYPES	-	Y	Credit Card Types	List of Credit Card Types
-	AMEX		Amex	American Express
-	DINERS		Diners	Diners Club
-	DISCOVER		Discover	Discover
-	ENROUTE		Enroute	En route
-	JCB		JCB	JCB
-	MASTERCARD		Master Card	Master Card
-	VISA		Visa	Visa Card
CS_FILTER_OPTIONS	-	N	Search Filter Criteria	List of Filter Criteria used on setup UIs
-	ACTIVE	-	Active	Active
-	ALL	-	All	All
-	PLANNED	-	Planned	Planned
CS_MULTI_ORG_RULE	-	N	Service Request Multi Org Rule	List of Service Request Multi Org Rule
-	RULE_CONTRACT	-	Operating Unit of the Contract	Operating unit of the contract
-	RULE_INSTALLED_BASE	-	Operating Unit of the Installed base product	Operating Unit of the Installed base product

Lookup Type	Lookup Code	User Extensible	Meaning	Description
-	RULE_PROFILE	-	Profile Option MO: Operating Unit	Profile Option MO: Operating Unit
-	RULE_SR	-	Operating Unit Stamped on the Service Request	Operating unit stamped on the service request
CS_PRODUCT_FAMILY_FUNCTION	-	N	Product Family Function	Product Family Function
-	SERVICE_CHARGES	-	Service Charges	ProductFamilyFunction
CS_RESP_ACCESS_TYPE	-	N	Service Responsibility Access Level	List of Service Responsibility Access Levels
-	ALL	-	All Request Types	All Request Types
-	LIST	-	Select Request Type	Select Request Type
CS_RESP_BUSINESS_USAGE	-	N	Service Responsibility Business Usage	List of Business Usages which can be associated to a Service Responsibility
-	AGENT	-	Service Provider	Service Provider
-	SELF_SERVICE	-	Self Service User	Self Service User
CS_SECURITY_TYPE	-	N	Service Security Level	List of Service Security Levels
-	CUSTOM	-	Custom Security	Custom Security
-	NONE	-	No Security	No Security
-	STANDARD	-	Standard Security	Standard Security
CS_SR_ASSIGNMENT_LEVEL	-	N	Service Request Assignment Level	List of Service Request Assignment Levels
-	GROUP	-	Group	Group Resource
-	INDIVIDUAL	-	Individual	Individual Resource
CS_SR_AUDIT_FIELDS	-	N	All Audit fields	List of audit columns displayed on the Service Request Audit UI.
-	ACCOUNT_ID	-	Account	Account

Lookup Type	Lookup Code	User Extensible	Meaning	Description
-	ACTUAL_RESOLUTION_DATE		Resolved On	Resolved On
-	ALL	-	All	All
-	BILL_TO_ACCOUNT_ID	-	Bill To Account Number	Bill To Account Number
-	BILL_TO_CONTACT_ID	-	Bill to Contact	Bill to Contact
-	BILL_TO_PARTY_ID	-	Bill To Party	Bill To Party
-	BILL_TO_SITE_ID	-	Bill To Site	Bill To Site
-	CATEGORY_SET_ID	-	Category Set	Category Set
-	CLOSE_DATE	-	Close Date	Close Date
-	COMM_PREF_CODE	-	Communication Preference	Communication Preference
-	CONTRACT_ID	-	Contract	Contract
-	CONTRACT_NUMBER	-	Contract Number	Contract Number
-	CONTRACT_SERVICE_ID	-	Contract Line Description	Contract Line Description
-	COVERAGE_TYPE	-	Coverage	Coverage
-	CP_COMPONENT_ID	-	Component	Component
-	CP_COMPONENT_VERSION_ID	-	Component Version	Component Version
-	CP_REVISION_ID	-	Revision	Revision
-	CP_SUBCOMPONENT_ID	-	Sub Component	Sub Component
-	CP_SUBCOMPONENT_VERSION_ID	-	Sub Component Version	Sub Component Version
-	CURRENT_SERIAL_NUMBER	-	Serial	Serial

Lookup Type	Lookup Code	User Extensible	Meaning	Description
-	CUST_PREF_LANG	-	Customer Preferred Language	Customer Preferred Language
-	CUSTOMER_EMAIL_ID	-	Customer Email	Customer Email
-	CUSTOMER_PHONE_ID	-	Customer Phone	Customer Phone
-	CUSTOMER_PO_NUMBER	-	PO Num	PO Num
-	CUSTOMER_PRODUCT_ID	-	Item Instance	Item Instance
-	CUSTOMER_TICKET_NUMBER	-	Ticket Number	Ticket Number
-	DATABASE	-	Database	Database
-	DB_VERSION	-	Database Version	Database Version
-	ERROR_CODE	-	Error Code	Error Code
-	EXPECTED_RESOLUTION_DATE	-	Expected Resolution Date	Expected Resolution Date
-	EXTERNAL_REFERENCE	-	Tag	Tag
-	GROUP_ID	-	Group Name	Group Name
-	GROUP_TYPE	-	Group Type	Group Type
-	INC_RESPONDED_BY_DATE	-	Responded On	Responded On
-	INCIDENT_ADDRESS	-	Address	Address
-	INCIDENT_ADDRESS_STYLE	-	Address Style	Address Style
-	INCIDENT_ADDRESS2	-	Address 2	Address 2
-	INCIDENT_ADDRESS3	-	Address 3	Address 3

Lookup Type	Lookup Code	User Extensible	Meaning	Description
-	INCIDENT_ADDRESS4	-	Address 4	Address 4
-	INCIDENT_CITY	-	City	City
-	INCIDENT_COUNTRY	-	Country	Country
-	INCIDENT_COUNTY	-	County	County
-	INCIDENT_CROSS_STREET	-	Cross Street	Cross Street
-	INCIDENT_DIRECTION_QUALIF	-	Direction Qualifier	Direction Qualifier
-	INCIDENT_DISTANCE_QUAL_UOM	-	Distance UOM	Distance UOM
-	INCIDENT_DISTANCE_QUALIF	-	Distance Qualifier	Distance Qualifier
-	INCIDENT_FLOOR	-	Floor	Floor
-	INCIDENT_HOUSE_NUMBER	-	House Number	House Number
-	INCIDENT_LOC_DESCRIPTION	-	Location Description	Location Description
-	INCIDENT_LOC_DIRECTION	-	Location Direction	Location Direction
-	INCIDENT_LOCATION_ID	-	Incident Address	Incident Address
-	INCIDENT_OCCURED_DATE	-	Incident Occurred Date	Incident Occurred Date
-	INCIDENT_OWNER_ID	-	Owner	Owner
-	INCIDENT_PO_BOX_NUMBER	-	PO Box	PO Box
-	INCIDENT_POINT_OF_INTEREST	-	Point Of Interest	Point Of Interest

Lookup Type	Lookup Code	User Extensible	Meaning	Description
-	INCIDENT_POSITION	-	Position	Position
-	INCIDENT_POSTAL_CODE	-	Postal Code	Postal Code
-	INCIDENT_POSTAL_PLUS4_CODE	-	Postal Code + 4	Postal Code + 4
-	INCIDENT_PROVINCE	-	Province	Province
-	INCIDENT_RESOLVED_DATE	-	Resolution On	Resolution On
-	INCIDENT_SEVERITY_ID	-	Severity	Severity
-	INCIDENT_STATE	-	State	State
-	INCIDENT_STATUS_ID	-	Status	Status
-	INCIDENT_STREET	-	Street	Street
-	INCIDENT_STREET_NUMBER	-	Street Number	Street Number
-	INCIDENT_STREET_SUFFIX	-	Street Suffix	Street Suffix
-	INCIDENT_SUITE	-	Suite	Suite
-	INCIDENT_TYPE_ID	-	Type	Type
-	INCIDENT_URGENCY_ID	-	Urgency	Urgency
-	INSTALL_SITE_ID	-	Installed At Address	Installed At Address
-	INV_COMPONENT_ID	-	Inventory Component	Inventory Component
-	INV_COMPONENT_VERSION	-	Inventory Component Version	Inventory Component Version
-	INV_ITEM_REVISION	-	Inventory Item Revision	Inventory Item Revision

Lookup Type	Lookup Code	User Extensible	Meaning	Description
-	INV_SUBCOMPONENT_ID	-	Inventory Sub Component	Inventory Sub Component
-	INV_SUBCOMPONENT_VERSION	-	Inventory Sub Component Version	Inventory Sub Component Version
-	LAST_UPDATE_CHANNEL	-	Last Update Channel	Last Update Channel
-	OBLIGATION_DATE	-	Obligation Date	Obligation Date
-	OPERATING_SYSTEM	-	Operating System	Operating System
-	OPERATING_SYSTEM_VERSION	-	Operating System Version	Operating System Version
-	ORG_ID	-	Organisation	Organisation
-	ORIG_SYSTEM_REFERENCE	-	Original System Reference	Original System Reference
-	ORIGINAL_ORDER_NUMBER	-	Order Number	Order Number
-	PLATFORM_ID	-	Platform	Platform
-	PLATFORM_VERSION_ID	-	Platform Version	Platform Version
-	PROBLEM_CODE	-	Problem	Problem
-	PROJECT_NUMBER	-	Project	Project
-	PUBLISH_FLAG	-	Publish	Publish
-	PURCHASE_ORDER_NUM	-	Sales PO Number	Sales PO Number
-	QA_COLLECTION_ID	-	QA Collection Plan	QA Collection Plan
-	RESOLUTION_CODE	-	Resolution Code	Resolution Code
-	RESOURCE_TYPE	-	Resource Type	Resource Type
-	SHIP_TO_ACCOUNT_ID	-	Ship To Account Number	Ship To Account Number

Lookup Type	Lookup Code	User Extensible	Meaning	Description
-	SHIP_TO_CONTACT_ID	-	Ship to Contact	Ship to Contact
-	SHIP_TO_PARTY_ID	-	Ship To Party	Ship To Party
-	SHIP_TO_SITE_ID	-	Ship To Address	Ship To Address
-	SITE_ID	-	Site	Site
-	SR_CREATION_CHANNEL	-	Channel	Channel
-	SYSTEM_ID	-	System	System
-	TERRITORY_ID	-	Territory	Territory
-	TIER	-	Tier	Tier
-	TIER_VERSION	-	Tier Version	Tier Version
-	TIME_ZONE_ID	-	Time Zone	Time Zone
CS_SR_AUTO_CLOSURE_VALUES	-	N	Lookup Type which defines values for SR auto-closure state	Lookup Type which defines values for SR auto-closure state
-	CS_SR_NONE	-	No	SR validate and auto-closure feature is turned off
-	CS_SR_VALIDATE_AND_CLOSE	-	Yes	SR validate and auto-closure is turned on
CS_SR_CALLER_TYPE	-	N	Service Request Caller Types	List of service request caller types
-	CALLER_EMP	-	Employee	Employee
-	ORGANIZATION	-	Organization	Organization
-	PERSON	-	Person	Person
CS_SR_CHILD_ENTITY_CODE	-	N	Service Request Child Entities	List of Service Request Child Entities
-	SR_CONTACT_POINT	-	Service Request Contact Point	Service Request Contact Point
-	SR_ESCALATION	-	Service Request Escalation	Service Request Escalation

Lookup Type	Lookup Code	User Extensible	Meaning	Description
-	SR_HEADER	-	Service Request Header	Service Request Header
-	SR_LINK	-	Service Request Link	Service Request Link
-	SR_NOTE	-	Service Request Note	Service Request Note
-	SR_SOLUTION_LINK	-	Service Request Solution Link	Service Request Solution Link
-	SR_TASK	-	Service Request Task	Service Request Task
CS_SR_CONTACT_TYPE	-	N	Valid Contact Types for creating a Service Request	Valid Contact Types for creating a Service Request
-	EMPLOYEE	-	Employee	Employee
-	PARTY_RELATIONSHIP	-	Customer	Customer
-	PERSON	-	Person	Person
CS_SR_CREATION_CHANNEL	-	Y	Service Request Creation Channels	Creation channels for a service request
-	AGENT	-	Agent	Create a Service Request by Agent
-	AUTOMATIC	-	Automatic	Automatic
-	EMAIL	-	Email	Create a service request via Email
-	FAX	-	Fax	Create a service request via a Fax
-	PHONE	-	Phone	Create a service request via Phone
-	WALKIN	-	Walk-In	Create a service request via Walk-in
-	WEB	-	Web	Create a service request via Web
CS_SR_DEFAULT_TAB	-	N	Service Request Default Tab	List of tab pages available on Service Request UI
-	ADDRESSES	-	Addresses	Tab for Addresses

Lookup Type	Lookup Code	User Extensible	Meaning	Description
-	CHARGES	-	Charges	Tab for Charges
-	CONTACTS	-	Contacts	Tab for Contacts
-	CONTACTS_AND_ADDRESSES	-	Contact and Addresses	Tab for Contact and Addresses
-	CSXCUST1	-	First Custom Tab	First Custom Tab
-	CSXCUST2	-	Second Custom Tab	Second Custom Tab
-	INTERACTIONS	-	Interactions	Tab for Interactions
-	LOG	-	Log	Tab for Log
-	MAINTENANCE_REQUESTS	-	Maintenance Requests	Tab for Maintenance Requests
-	PRODUCT_COVERAGE	-	Subject	Tab for Subject
-	RELATED_DOCUMENTS	-	Related Objects	Tab for Related Objects
-	SERVICE_HISTORY	-	Service History	Tab for Service History
-	TASKS	-	Tasks	Tab for Tasks
-	WORKBENCH	-	Workbench	Tab for Workbench
-	WORKORDERS	-	Workorders	Tab for Workorders
CS_SR_DIRECTIONS	-	Y	CS_SR_DIRECTIONS	Distance Qualifier Unit of Measure while entering non-postal components for incident_Address
-	E	-	East	East
-	N	-	North	North
-	NE	-	North East	North East
-	NW	-	North West	North West
-	S	-	South	South
-	SE	-	South East	South East
-	SW	-	South West	South West
-	W	-	West	West

Lookup Type	Lookup Code	User Extensible	Meaning	Description
CS_SR_DISTANCE_UOM	-	Y	CS_SR_DISTANCE_UOM	Distance Unit of Measure
-	KM	-	Kilometers	Kilometers
-	METER	-	Meters	Meters
-	MILE	-	Miles	Miles
-	YARD	-	Yards	Yards
CS_SR_DUPLICATE_REASON_CODE	-	N	Service: Duplicate Check found Reason Code	List of duplicate reason codes. These are used to display messages when duplicate Service Requests are found by the duplicate check process.
-	CS_CUST_PROD_EA_ADDR_MCH	-	Customer, Item, and Address are matched	Customer, Item, and Incident Address are matched
-	CS_CUST_PROD_EA_EA_ADDR_MCH	-	Customer, Item, Attributes, and Incident Address are matched	Customer, Item, Extended Attributes Incident Address are matched
-	CS_CUST_PROD_EA_MCH	-	Customer, Item and Attributes are matched	Customer, Item, and Extended Attributes are matched
-	CS_CUST_PROD_SER_EA_ADD_MCH	-	Customer, Item, Serial Number, and Incident Address are matched	Customer, Item, Serial Number, and Incident Address are matched
-	CS_CUST_PROD_SER_EA_EA_ADD_MCH	-	Customer, Item, Serial Number, Attributes, and Address matched	Customer, Item, Serial Number, Extended Attributes, and Incident Address are matched
-	CS_CUST_PROD_SER_EA_MCH	-	Customer, Item, Serial Number, and Attributes are matched	Customer, Item, Serial Number, and Extended Attributes are matched

Lookup Type	Lookup Code	User Extensible	Meaning	Description
-	CS_CUST_PROD_SERIAL_MCH	-	Customer, Item, and Serial Number are matched	Customer, Item, and Serial Number are matched
-	CS_EA_EA_ADDR_MCH	-	Attributes and Address are matched	Extended Attributes and Incident Address are matched
-	CS_EA_EA_MCH	-	Attributes are matched	Extended Attributes are matched
-	CS_EA_INCIDENT_ADDR_MCH	-	Address is matched	Incident Address is matched
-	CS_INSTANCE_EA_EA_ADDR_MCH	-	Instance, Attributes, and Address are matched	Instance Extended Attributes and Incident Address are matched
-	CS_INSTANCE_EA_INC_ADDR_MCH	-	Instance and Address are matched	Instance and Incident Address are matched
-	CS_INSTANCE_EA_MCH	-	Instance and Attributes are matched	Instance and Extended Attributes are matched
-	CS_INSTANCE_MCH	-	Instance is matched	Instance is matched
-	CS_INSTANCE_OR_CUST_PROD_MCH	-	Customer and Item are matched	Customer and Item are matched
-	CS_ORIGINAL_OF_DUP_SR	-	The original of the Duplicate	The original of the Duplicate
CS_SR_DUP_CRITERIA	-	N	Service: Service Requests Duplicate Criteria	List of criteria used in Service Requests Duplicate check
-	CS_DUP_CRIT_EA_ADDR	-	Extended Attributes and Incident Address	Extended Attributes and Incident Address
-	CS_DUP_CRIT_INST_CUST_PROD	-	Item Instance/ Customer and Item	Item Instance/ Customer and Item
-	CS_DUP_CRIT_INST_CUST_PROD_SER	-	Item Instance/ Customer Item Serial Number	Item Instance/ Customer Item Serial Number

Lookup Type	Lookup Code	User Extensible	Meaning	Description
-	CS_DUP_CRIT_WITH_SERIAL	-	All with Serial Number	All with Serial Number
-	CS_DUP_CRIT_WITHNO_SERIAL	-	All without Serial Number	All without Serial Number
CS_SR_ENTITY_ACTIVITY_CODE	-	N	Service Request Child Entity Activities	List of Service Request Child Entity Activities
-	C	-	Created	Created
-	D	-	Deleted	Deleted
-	U	-	Updated	Updated
CS_SR_FILTERBY_SRTAB	-	N	Service request tab filter by list	Service request tab filter by list
-	ACCOUNT_NUMBER	-	Account Number	Account Number
-	CONTRACT_NUMBER	-	Contract Number	Contract Number
-	EXTERNAL_REFERENCE	-	Tag Number	Tag Number
-	INCIDENT_ADDRESS	-	Incident Address	Incident Address
-	PRODUCT	-	Item Name	Item Name
-	RMA_NUMBER	-	RMA Number	RMA Number
-	SERIAL_NUMBER	-	Serial Number	Serial Number
-	SERVICE_REQUEST_NUMBER	-	Service Request Number	Service Request Number
CS_SR_GRANT_TYPE	-	N	Service Request grant types	List of Service Request grant types.
-	N	-	All web enabled Service Request Types	All web enabled Service Request Types
-	Y	-	Only Service Request Types mapped to User's Responsibility	Only Service Request Types mapped to User's Responsibility

Lookup Type	Lookup Code	User Extensible	Meaning	Description
CS_SR_INTERACTION_LOGGING	-	N	Service: Interaction Logging	Service: Interaction Logging
-	AUTO_INT_LOG	-	Log Interactions automatically	Log Interactions automatically
-	MANUAL_INT_LOG	-	Log Interactions manually	Log Interactions manual
-	NO_INT_LOG	-	Do not log Interactions	Do not log Interactions
CS_SR_LOCATION_TYPE_CODE	-	N	Service Request Location Types	Service Request Location Types
-	HZ_LOCATIONS	-	HZ Location	The location is defined in HZ_LOCATIONS table.
-	HZ_PARTY_SITES	-	Party Site	The location is defined in HZ_CUST_SITE_USES_ALL table.
CS_SR_LOG_CHECK_BOX	-	N	Service: Log tab default check box	List of check boxes displayed on the Service Request Log window.
-	ACTIVITY	-	Activity Records	Activity Records
-	ALL	-	All Records	All Records
-	AUDIT	-	Audit Records	Audit Records
-	NOTE	-	Notes Records	Notes Records
-	SOLN	-	KB Solution Records	KB Solution Records
-	TASK	-	Task Records	Task Records
CS_SR_PRODUCT_RELATION_TYPE	-	N	Service: Item, Item Category, None selection	List of values used for the Item radio groups on setup UIs.
-	NONE	-	None	None
-	PRODUCT_CATEGORY	-	Item Category	Item Category
-	PRODUCT_P	-	Item	Item

Lookup Type	Lookup Code	User Extensible	Meaning	Description
CS_SR_SERV_REQ_ENABLED_TYPE	-	N	Used to determine if an item can have a Service Request logged for it.	Used to determine if an item can have a Service Request logged for it.
-	D	-	Disabled	Disabled
-	E	-	Enabled	Enabled
-	I	-	Inactive	Inactive
CS_SR_SOURCE_PROGRAMS	-	Y	Service Request Source Program Codes	List of program codes which creates or updates Service Requests
-	ACCOUNT_MERGE	-	Account Merge	Account Merge Program
-	AHL_NONROUTINE	-	Service Request for a Non-Routine job	Service Request for a Non-Routine job
-	AHL_ROUTINE	-	Service Request for a routine job	Service Request for a routine job
-	BIV_SR_UPDATE	-	Service Intelligence	Service Intelligence
-	CSCCCQSR.SCR	-	Seeded Script	Script (Seeded Script from SR/CSC)
-	CSD_REPAIR_ORDER_FORM	-	Depot Repair - Repair Order form	Depot Repair - Repair Order form
-	CSL_LAPTOP	-	Field Service / Laptop	Field Service / Laptop
-	CSM_UPSYNC_WRAPPER	-	CSM Upward Synchronization Wrapper Package	CSM upward synchronization wrapper package
-	CSXSRISR	-	Teleservice-Service Request Form	Teleservice-Service Request Form
-	CSXSRTAB	-	Teleservice Service Request Tab	Teleservice Service Request Tab
-	CSZSRC	-	Service Online: Create call from CszIncidentEO	Service Online: Create call from CszIncidentEO
-	CSZSRU	-	Service Online: Update call from CszIncidentEO	Service Online: Update call from CszIncidentEO

Lookup Type	Lookup Code	User Extensible	Meaning	Description
-	EMAILCENTER	-	eMail Center	eMail Center
-	EVENT_SUBSCRIPTION	-	Event Subscription	Event Subscription
-	ISUPPORTSRUI	-	iSupport Service Request UI	iSupport Service Request UI
-	OKS_CT_EVENTS_WFA	-	Service Contract Events API	Service Contract Events API
-	PARTY_MERGE	-	Party Merge	Party Merge Program
-	PMCON	-	Preventive Maintenance - Concurrent Request	Preventive maintenance - concurrent request
-	SRAMCONC	-	Service Auto-assignment concurrent program	Service Auto-assignment concurrent program
-	SUPPORT.WF	-	Workflow for Customer Support	Workflow for Customer Support
-	UNKNOWN	-	Source Program Code not specified	Source Program Code not specified
-	XNSSRISR	-	Service for Comms	Service for Comms
CS_SR_STATUS_CLASS	-	N	Service Request Status Classification	Service Request Status Classification
-	WAIT_ON_CUSTOMER	-	Waiting on Customer	Waiting on Customer
-	WAIT_ON_EXT_GROUP	-	Waiting on External Group	Waiting on External Group
-	WAIT_ON_INT_GROUP	-	Waiting on Internal Group	Waiting on Internal Group
-	WAIT_ON_SUPPORT	-	Waiting on Support	Waiting on Support
CS_SR_STATUS_CONDITIONS	-	N	Status Change Event Conditions	List of status change conditions
-	STATUS_CHANGED_FROM	-	Status Changed From	Status Changed From

Lookup Type	Lookup Code	User Extensible	Meaning	Description
-	STATUS_CHANGED_TO	-	Status Changed To	Status changed to
CS_SR_TGT_SEARCH_RULES	-	N	Task Template Search Rule Codes	List of Search rules used in finding the Task Template for auto task generation feature.
-	C	-	Product Category	Rule to Search by Product Category
-	CP	-	Product Category Problem Code	Rule to Search by Product Category and Problem Code
-	I	-	Product	Rule to Search by Product
-	IP	-	Product Problem Code	Rule to Search by Product and Problem Code
-	P	-	Problem Code	Rule to Search by Problem Code
-	T	-	Service Request Type	Rule to Search by ServiceRequestType
-	TC	-	Service Request Type Product Category	Rule to Search by Service Request Type andProductCategory
-	TCP	-	Service Request Type Product Category Problem Code	Rule to Search by Service Request Type Product Category and Problem Code
-	TI	-	Service Request Type Product	Rule to Search by Service Request Type andProduct
-	TIP	-	Service Request Type Product Problem Code	Rule to Search by Service Request Type Product and Problem Code
-	TP	-	Service Request Type Problem Code	Rule to Search by Service Request Type andProblemCode

Lookup Type	Lookup Code	User Extensible	Meaning	Description
CS_SR_UPDATED_FIELDS	-	N	Update Fields of Service Request	List of updated attributes used in notification messages
-	CS_SR_SEVERITY	-	Severity	Severity
-	CS_SR_STATUS	-	Status	Status
-	CS_SR_SUMMARY	-	Summary	Summary
-	CS_SR_TYPE	-	Type	Type
-	CS_SR_URGENCY	-	Urgency	Urgency
CS_SR_UWQ_GROUP_LABEL	-	Y	Service: SR UWQ Group Label	Service: SR UWQ Group Label
-	GROUP_LABEL	-	Groups	Groups
-	MY_GROUP_LABEL	-	My Groups	My Groups
CS_SR_UWQ_MY_LABEL	-	N	Service: SR UWQ My Label	Service: SR UWQ My Label
-	MY_LABEL	-	My Service Request	My Service Request
CS_SR_UWQ_TEAM_LABEL	-	N	Service: SR UWQ Team label	Service: SR UWQ Team label
-	MY_TEAM_LABEL	-	My Teams	My Teams
-	TEAM_LABEL	-	Teams	Teams
CS_SR_VIEW_CHOICES	-	N	Possible viewing choices	3 possible viewing choices will be seeded in this lookup
-	ACTIVE	-	Active	ActiveMappingRules
-	ALL	-	All	AllmappingRules
-	PLANNED	-	Planned	Planned Mapping Rules

Service Security Seeded Data

This appendix lists seeded data for Oracle TeleService. You can enable or disable elements of the Oracle TeleService application including tabs, buttons, menus, and regions by mapping the functions listed in this appendix to responsibilities. You can use the seeded data security information as a guide to creating custom security.

Note: Do not modify seed data. Seed data is provided for you to use as delivered. If you want to make modifications, please make a copy and modify your copy.

E.1 Seeded Functions

This group of topics lists the functions you can map to responsibilities using procedures described in *Oracle Applications System Administrator's Guide*. It lists functions for:

- Contact Center
- Service Request Functions

E.1.1 Contact Center Functions

This table lists the Contact Center functions you can map to responsibilities:

Description	Function	Affected Tab or Window
Access to the Create Customer button	CSCSFNCT	Contact Center header

Description	Function	Affected Tab or Window
Access to the Create Contact button	CSCSFNCO	Contact Center header
Ability to create a customer in Create Contact window	CSCSFCCC	Create Contact window
Access to the Edit Customer button	CSCSFECT	Contact Center header
Access to the Edit Contact button	CSCSFECO	Contact Center header
Access to the Dashboard tab*	CSCSFDSB	Contact Center Dashboard tab
Access to the Dashboard tab Refresh button	CSCSFRBU	Contact Center Dashboard tab
Access to the Party Information tab	CSCSFPTY	Contact Center Party Information tab
The ability to update customer information on the Party Information tab	CSCSFUPI	Contact Center Party Information tab
Access to the Details button on the Party Information tab	CSCSFDBU	Contact Center Party Information tab
Access to the Contact Restrictions button on the Party Information tab	CSCSFCRB	Contact Center Party Information tab
Access to the Relationships tab	CSCSFREL	Contact Center Relationships tab
The ability to create and update relationships on the Relationships tab.	CSCSFCRE	Contact Center Relationships tab
Access to the Accounts tab	CSCSFACT	Contact Center Accounts tab
The ability to create accounts on the Accounts tab	CSCSFCAT	Contact Center Accounts tab
The ability to update account information in the Accounts tab	CSCSFUAT	Contact Center Accounts tab

Description	Function	Affected Tab or Window
Access to the Details button on the Accounts tab. This button launches the Customer Account Details window.	CSCSFADB	Contact Center Accounts tab
Access to the Credit tab of the Customer Account Details window.	CSCSFCRD	Contact Center Accounts tab Account Details Window
Access to the Roles tab of the Customer Account Details window and the ability to create and update roles.	CSCSFROL	Contact Center Accounts tab Account Details Window
Access to the Suspensions tab of the Customer Account Details window.	CSCSFSUS	Contact Center Accounts tab Account Details Window
Access to the Sites tab of the Customer Account Details window and the ability to create and update sites.	CSCSFSIT	Contact Center Accounts tab Account Details Window
Access to the Relationships tab of the Customer Account Details window and the ability to create new relationships.	CSCSFRTB	Contact Center Accounts tab Account Details Window
Access to the Customer Standard button on the Accounts Tab. This button launches the Customers - Standard window.	CSCSFCSN	Contact Center Accounts tab
Access to the Addresses tab	CSCSFADR	Contact Center Addresses tab
Create and update addresses on the Addresses tab	CSCSFCAD	Contact Center Addresses tab
Access to the Identifying Address button on the Addresses tab. This button is used to create or change the customer's identifying address.	CSCSFIAB	Contact Center Addresses tab

Description	Function	Affected Tab or Window
Access to the Site Contact Points button on the Addresses tab. This button makes it possible to enter addresses for customer sites.	CSCSFSCP	Contact Center Addresses tab
Access to the Contact Points tab	CSCSFCPT	Contact Center Contact Points tab
The ability to create and update contact points in the Contact Points tab	CSCSFCCP	Contact Center Contact Points tab
Access to the Interactions tab	CSCSFINT	Contact Center Interactions tab
Access the Account Interactions button on the Interactions tab	CSCFAAB	Contact Center Interactions tab
Access to the All Interactions button in the Interactions tab	CSCSFAIB	Contact Center Interactions tab
Access to the Service Request tab	CSCSFSR	Contact Center Service Request tab
Access to the Notes tab	CSCSFWKB	Contact Center Notes tab
Create and update Notes on the Notes tab	CSCSFCNO	Contact Center Notes tab
Access to the Tasks tab	CSCSFTSK	Contact Center Tasks tab
Create a task on the Tasks tab	CSCSFCTK	Contact Center Tasks tab
Update a task on the Tasks tab	CSCSFUTK	Contact Center Tasks tab
Access the Assignment Manager button next to the Owner and Assignee fields of the Tasks tab	CSCSFAMB	Contact Center Tasks tab
Access the Details button on the Tasks tab	CSCSFATB	Contact Center Tasks tab
Access to the Add Notes button on the Tasks tab	CSCSFANB	Contact Center Tasks tab
Access to the Use Template button on the Tasks tab	CSCSFUTB	Contact Center Tasks tab

Description	Function	Affected Tab or Window
Access to the Launch Workflow button on the Tasks tab	CSCSFLWF	Contact Center Tasks tab
Access to the More button on the Tasks tab	CSCSFMBU	Contact Center Tasks tab
Access to the Orders tab	CSCSFORD	Contact Center Orders tab
Access to the New button on the Orders tab of the Contact Center	CSCSNORB	Contact Center Orders tab
Access to the Details button on the Orders tab	CSCSODEB	Contact Center Orders tab
Access to the Invoices tab	CSCSFINV	Contact Center Invoices tab
Access to the Transaction Details button	CSCSFADB	Contact Center Invoices tab
Access to the Adjustment Processing button	CSCSFAPB	Contact Center Invoices tab
Access to the Payment Processing button	CSCSFPPB	Contact Center Invoices tab
Access to the Payment Details button	CSCSFPDB	Contact Center Invoices tab
Access to the Contracts tab	CSCSFOKS	Contact Center Contracts tab
Access to the Install Base tab	CSCSFIB	Contact Center Install Base tab
Access to the Collateral tab	CSCSFCOL	Contact Center Collateral Tab
Access to the Universal Work Queue icon in the toolbar and the corresponding menu selection	CSCSFUWQ	Toolbar
Access to the Soft Phone icon in the toolbar and the corresponding menu selection	CSCSFSPB	Toolbar
Access to the Quick Menu icon in the toolbar and the corresponding menu selection	CSCSFQMB	Toolbar
Access to the Script icon in the toolbar and the corresponding menu selection	CSCSFSCB	Toolbar

Description	Function	Affected Tab or Window
Access to the Call Information icon in the toolbar and the corresponding menu selection	CSCSFCIB	Toolbar
Access to the Call Wrap Up icon in the toolbar and the corresponding menu selection	CSCSFCWU	Toolbar
Access to the Open Email Compose Window icon in the Toolbar, the Contact Center header, and the Contact Points tab. This also controls access to the corresponding menu selection.	CSCSFECW	Contact Center header and tabs
Access to the Knowledge Base icon in the toolbar and the corresponding menu selection	CSCSKBIC	Toolbar
Access to the Initiate Call button in the Contact Center header and Contact Points tab. This button is located next to the Phone field.	CSCSFPBU	Contact Center header

E.1.2 Service Request Functions

The following table lists the service-request-related functions:

Description	Function	Affected Tab or Window
Create Service Request	CS_HA_INST_SERVICE_REQUEST	Service Request Creation
Update Service Requests	CS_HA_UPDT_SERVICE_REQUEST	Service Request Update
Access the Find Instance button	CS_HA_AXS_FIND_PRD_BTN	Service Request header
Access to the Find Icon	CS_HA_AXS_FIND_ICON	Service Request header
Access to the Subject tab	CS_HA_AXS_PRD_COV_TAB	Subject tab
Access Instance Configuration button on the Subject tab	CS_HA_AXS_PRD_CONFIG_BTN	Subject tab
Access to the Workbench tab	CS_HA_AXS_WORKBENCH_TAB	Workbench tab
Access to the Search Knowledge button	CS_HA_AXS_KB_UI	Workbench tab

Description	Function	Affected Tab or Window
Ability to create notes	CS_HA_ADD_NOTES	Workbench tab
Ability to update notes	CS_HA_UPDT_NOTES	Workbench tab
Access to the Note Detail button	CS_HA_AXS_NOTE_DETAIL_BTN	Workbench tab
Access to the Log and Notes button	CS_HA_AXS_VIEW_LOG_BTN	Workbench tab
Access Log Tab	CS_HA_AXS_LOG_TAB	
Access to the Contacts/Addresses tab	CS_HA_AXS_CONTACTS_TAB	Contacts/Addresses tab
Create Contact and Contact Point	CS_HA_INST_CONTACTS	
Update Contact and Contact Point	CS_HA_UPDT_CONTACTS	
Access Address Tab	CS_HA_AXS_ADDRESS_TAB	
Access Tasks Tab	CS_HA_AXS_TASK_TAB	
Create Tasks	CS_HA_INST_TASK	
Update Task	CS_HA_UPDT_TASK	
Access Use Template Button	CS_HA_AXS_USE_TEMPLATE_BTN	
Access Launch Workflow Button	CS_HA_AXS_LAUNCH_WF_BTN	
Access Task Details UI	CS_HA_AXS_TASK_DETAIL_BTN	
Access Interactions Tab	CS_HA_AXS_INTERACTION_TAB	
Access Related Documents Tab	CS_HA_AXS_REL_DOCS_TAB	
Create Related Document	CS_HA_INST_REL_DOCS	
Update Related Document & Access Delete Link button	CS_HA_UPDT_REL_DOCS	
Access Service History Tab	CS_HA_AXS_SRV_HIST_TAB	
Access Customer Profile	CS_HA_AXS_CUSTOMER_PROFILE_BTN	
Access Customer Update UI	CS_HA_AXS_CUSTOMER_BTN	
Access AM UI	CS_HA_AXS_AM_BTNS	
Access UWQ Buttons (Call Info, Call Wrap Up, End Call, Agent on Break Buttons)	CS_HA_AXS_UWQ_BTNS	

Description	Function	Affected Tab or Window
Create Interactions and Activities	CS_HA_INST_INTERACTION_ACT	
Access Folder Button	CS_HA_AXS_FOLDER_BTN	
Access Attachments	CS_HA_AXS_ATTACHMENT_UI	
Access Translation	CS_HA_AXS_TRANSALATION	
Access Fulfillment Special Menu Item	CS_HA_AXS_FULFILMENT_SM	
Access Quick Menu Special Menu Item	CS_HA_AXS_QUICKMENU_SM	
Access Notes Special Menu Item	CS_HA_AXS_NOTES_SM	
Access Launch Service Request Workflow Special Menu Item	CS_HA_AXS_LAUNCH_SRWF_SM	
Access Abort Service Request Workflow Special Menu Item	CS_HA_AXS_ABORT_SRWF_SM	
Access Service Request Escalation Special Menu Item	CS_HA_AXS_SR_ESCALATE_SM	
Access Task Escalation Special Menu Item	CS_HA_AXS_TASK_ESCALATE_SM	
Access Send Message Special Menu Item	CS_HA_AXS_SEND_MESSAGE_SM	
Access View Message Special Menu Item	CS_HA_AXS_VIEW_MESSAGE_SM	
Access Copy Service Request Special Menu Item	CS_HA_AXS_COPY_SR_SM	
Access Counters Special Menu Item	CS_HA_AXS_COUNTER_SM	
Create Charges	CS_HA_INST_CHRG	
Update Charges	CS_HA_UPDT_CHRG	
Access Service Request Audit Special Menu Item	CS_HA_AXS_SR_AUDIT_SM	
Access Scripting Special Menu Item	CS_HA_AXS_SCRIPTING_SM	
Access Outbound Email Special Menu Item	CS_HA_AXS_OUTBOUND_EMAIL_SM	
Access Print Request Special Menu Item	CS_HA_AXS_PRINT_REQUEST_SM	

Description	Function	Affected Tab or Window
Access Create Defect Special Menu Item	CS_HA_AXS_CREATE_DEFECT_SM	
Access Create Enhancement Special Menu Item	CS_HA_AXS_CREATE_ENHANCE_SM	
Access Web Availability Special Menu Item	CS_HA_AXS_WEB_ACT_SM	

E.2 Standard Service Security Seed Data

This section lists the seed data for the standard service security that comes with your application. You can use it as a guide for creating your own custom security.

E.2.1 Objects

The following table lists the objects used by standard service security:

Object Name	Description
CS_SERVICE_REQUEST	Service Request
CS_SR_TYPE	Service Request Type
JTF_RESOURCE	Resources

E.2.2 Object Functions (Form Functions)

The following table lists and describes the seeded functions.

Function Name	Related Object	Description
CS_INCIDENTS_B_SEC	CS_SERVICE_REQUEST	Update service requests
CS_SR_TYPE_SELECT_SEC	CS_SR_TYPE	Select Service Request Types
CS_JTF_RESOURCE_SELECT_SEC	JTF_RESOURCE	Select Service Request Type
CS_SR_ACCESS_RESP_SEC	JTF_RESOURCE	Assign service request resource

Function Name	Related Object	Description
CS_SR_ACCESS_RESP_SEC	CS_SERVICE_REQUEST	Service request security for Oracle Telephony Manager

E.2.3 Object Roles (FND Menus)

The following table lists and describes the seeded object roles. These are the service related menus.

Object Role (Menu_Name)	Description
CS_SR_VIEW_UPDATE	View and update service requests
CS_SR_TYPE_SELECT	Select Service Request Types
CS_RESOURCE_ASSIGN	Assign service request resources
CS_SR_ACCESS_RESP	Security request security for Oracle Telephony Manager

E.2.4 Object Role Functions (FND Menu Entries)

The following table lists and describes the seeded object role functions.

Object Role (Menu_Name in FND_MENUS)	Object Function (Function_name in FND_FORM_FUNCTIONS)	Purpose
CS_SR_VIEW_UPDATE	CS_INCIDENTS_B_SEC	Secures CS_SERVICE_REQUEST object in queries
CS_SR_TYPE_SELECT	CS_SR_TYPE_SELECT_SEC	To Secure CS_SR_TYPE in base queries in service security
CS_RESOURCE_ASSIGN	CS_JTF_RESOURCE_SELECT_SEC	For validating SR owner as resource.
CS_SR_ACCESS_RESP	CS_SR_ACCESS_RESP_SEC	Validates Oracle Telephony Manager access to service requests.

E.2.5 Object Instance Sets for Restricted Access

The following table lists and describes the seeded object instance sets used by the application when normal security is turned on.

Object Instance Set Name	Predicate	Description
CS_SR_SRTYPE_SEC	<pre> EXISTS(SELECT '1'FROM cs_sr_type_ mapping csmap WHERE csmap.incident_type_id = cs_ sr_access_resp_sec.incident_type_id AND csmap.responsibility_id = sys_context('FND', 'RESP_ID')AND csmap.application_id = sys_ context('FND', 'RESP_APPL_ID')AND trunc(sysdate) between trunc(nvl(csmap.start_date, sysdate)) AND trunc(nvl(csmap.end_ date,sysdate))) </pre>	Restricts service request access by Service Request Type
CS_SRTYPE_SEC	<pre> "AND EXISTS(SELECT '1'FROM cs_sr_ type_mapping csmapWHERE csmap.incident_type_id = cs_ incident_types_b_sec.incident_type_ id AND csmap.responsibility_id = sys_context('CS_SR_SECURITY', 'RESP_ID')AND csmap.application_id = sys_context('CS_SR_SECURITY', 'APPL_ID') AND trunc(sysdate) between trunc(nvl(csmap.start_date, sysdate)) AND trunc(nvl(csmap.end_date,sysdate)))" </pre>	Restricts availability of Service Request Types

Object Instance Set Name	Predicate	Description
CS_RESOURCE_SEC	<pre> EXISTS (SELECT '1' from FND_USER_RESP_GROUPS ur, cs_ sr_type_mapping csmap WHERE cs_jtf_rs_resource_extns_ sec.user_id = ur.user_id AND ur.responsibility_id = csmap.Responsibility_id AND ur. responsibility application_ id = csmap.application_id AND csmap.business_usage = 'AGENT' AND csmap.incident_type_id = sys_ context('CS_SR_SECURITY', 'SRTYPE_ ID') AND trunc(sysdate) between trunc(nvl(ur.start_date,sysdate)) AND trunc(sysdate) between trunc(nvl(csmap.start_date, sysdate)) AND trunc(nvl(csmap.end_date,sysdate))) OR (cs_jtf_rs_resource_extns_ sec.user_id is NULL) </pre>	Restricts the assignment of resources to service requests
CS_SR_ACCESS_RESP_SEC	<pre> "AND EXISTS (SELECT '1' from cs_sr_type_mapping csmap WHERE csmap.incident_type_id = cs_incidents_b_sec.incident_type_id AND csmap.responsibility_id = sys_context('CS_SR_SECURITY', 'RESP_ID')AND csmap.application_id = sys_context('CS_SR_SECURITY', 'APPL_ID') AND trunc(sysdate) between trunc(nvl(csmap.start_date, sysdate)) AND trunc(nvl(csmap.end_date,sysdate)))" </pre>	Restricts access to service requests by Service Request Type and responsibility

E.2.6 Object Instance Sets for Unrestricted Access

The following table lists and describes the seeded object instance sets used by the application when normal security is turned off and permits unrestricted access.

Object Instance Set Name	Predicate	Description
CS_SR_SRTYPE_NO_SEC	"1=1"	Permits unrestricted service request access by Service Request Type
CS_SRSTYPE_NO_SEC	"1=1"	Permits unrestricted availability of Service Request Types
CS_RESOURCE_NO_SEC	"1=1"	Permits unrestricted assignment of resources to service requests
CS_SR_ACCESS_RESP_NO_SEC	"1=1"	Permits unrestricted access to Service Request Types by responsibility

E.2.7 Grants

The following table lists all of the seeded grants. All seeded grants are set with the grantee of GLOBAL.

Description	Object Type	Object Role	Instance Set
Restricts access by Service Request Type	CS_SERVICE_REQUEST	CS_SR_VIEW_UPDATE	CS_SR_SRTYPE_SEC
Permits access to all Service Request Types when security is turned off.	CS_SERVICE_REQUEST	CS_SR_VIEW_UPDATE	CS_SR_SRTYPE_NO_SEC
Restricts service request access by Service Request Type and specific responsibility	CS_SERVICE_REQUEST	CS_SR_ACCESS_RESP	CS_SR_ACCESS_RESP_SEC
Permits access to all Service Request Types by responsibility when security is turned off.	CS_SERVICE_REQUEST	CS_SR_ACCESS_RESP	CS_SR_ACCESS_RESP_NO_SEC
Secures the Service Request Type list of values (LOV)	CS_SR_TYPE	CS_SR_TYPE_SELECT	CS_SRSTYPE_SEC
Permits access to all Service Request Types in the LOV when security is turned off	CS_SR_TYPE	CS_SR_TYPE_SELECT	CS_SRSTYPE_NO_SEC

Description	Object Type	Object Role	Instance Set
Restricts resources that can be assigned to service requests and service request tasks by Service Request Type.	JTF_TASK_RESOURCE	CS_RESOURCE_ASSIGN	CS_RESOURCE_SEC
Permits assignment of all resources to service requests and service request tasks when security is turned off	JTF_TASK_RESOURCE	CS_RESOURCE_ASSIGN	CS_RESOURCE_NO_SEC

System Profiles

This appendix lists the system profiles for the Service Request and Customer Care modules of Oracle TeleService.

F.1 Oracle TeleService System Profiles

The following table lists the system profiles for Oracle TeleService in alphabetical order. Here is an explanation of the table's columns:

- System Profile Name: The system profile name. An asterisk (*) next to a profile name indicates the profile is new in this release.
- Description: A description
- Level: A list of abbreviations representing the different levels at which the profile can be set:
 - * S: Site
 - * A: Application
 - * R: Responsibility
 - * U: User
- Default Setting and Level: The seeded default setting and the seeded level.
- Affects: The affected window or application module with references to the appropriate section of the guide where the profile is discussed.

Information not available is entered as Not Available.

Null settings for default values are described as None.

System Profile Name	Description	Levels	Default Setting and Level	Affects
Charge: Default Price List	Charges uses the price list you enter in this profile as the default price list when creating a new charge line with no contract or a contract with no associated no price list.	S,A,R,U	None	Charges
CSC: Oracle Scripting Three Tier Installation	Specifies if the scripting server is a two- or three-tier installation.	S,A,R,U	None	Scripting in Contact Center
CSC: Port for Oracle Scripting Application	Port for communicating with the scripting server.	S,A,R,U	None Default Level: S	Scripting in Contact Center
CSC: Server Machine for Oracle Scripting	Name of the host machine where the scripting server resides.	S,A,R,U	None Default Level: S	Scripting in Contact Center
CSC: SID of Oracle Scripting Database	The database used to support the scripting tool.	S,A,R,U	None	Scripting in Contact Center
CSY: Last Program Run Date	This system profile is reserved for future use. It is used to specify the date of the last run of the Service Analytics concurrent program. This profile option gives the date time value when either of these concurrent programs are run - KPI summary: Incremental Data LoadSet or KPI Summary: Initial Data Load Set'	S	-	-
CSY: Service Request Group Filter	This system profile is reserved for future use. Used in Embedded Analytic KPI for Group Parameter Value. Enter the group associated with the given user or enter ALL for all groups.	S	1 Level: S	-
Customer Care: Automatically Create an Account for a New Customer	Setting this profile to Yes, selects the Create Account check box in the Create Customer window by default and thus creates an account for a new customer. A No setting leaves the check box unselected and does not create the account.	S,A,R,U	No Default level: S	Create Customer

System Profile Name	Description	Levels	Default Setting and Level	Affects
Customer Care: Automatically Launch a Script for Identified Callers	When the application identifies a caller via Automatic Number Identification (ANI), you can automatically display a script for the agent to follow. Set this profile to the Oracle Scripting script you wish the application to display in the Contact Center.	S,A,R,U	None Default Level: S	Scripting in Contact Center
Customer Care: By Default Include Closed Invoices in Invoices Tab*	Sets the default value of the Include Closed check box in the Contact Center Invoices tab. A Yes setting selects the check box and includes closed invoices among those displayed in the tab. A No setting, the default, leaves the check box unselected and excludes closed invoices.	S,A,R,U	No Default level: S	Contact Center Invoices tab
Customer Care: Default a Type for New Notes in the Notes Tab	Specifies a default note Type for notes entered on the Notes tab of the Contact Center	S,A,R,U	None	Contact Center Notes tab
Customer Care: Default Address Style for Contact Center	If there is no address style associated with the customer's country, then the application uses the address style specified in this profile. By default this system profile is set to Oracle Sales Default Address Style (AS_DEFAULT).	S,A,R,U	Oracle Sales Default Address Style Default level: S	Contact Center See Specify Global Address Formatting and Address Validation on page 4-54.
Customer Care: Default Address Style for Contact Center	Service application support multiple address format for different countries. This profile specifies the default address style if no style exists for a particular country.	S,A,R,U	Oracle Sales Default Address Style Default Level: S	Contact Center address format See Specify Global Address Formatting and Address Validation on page 4-54.
Customer Care: Default Assignee for New Customer Tasks	Defaults the assignee for a new task in the Assignee field of the Contact Center Tasks tab.	S,A,R,U	None	Tasks Contact Center Tasks tab
Customer Care: Default Assignee Type for New Customer Tasks	Default assignee type in the Assignee Type field of the Contact Center Tasks tab. Tasks can be assigned either to an individual employee, a group, or a team. Available choices are: <ul style="list-style-type: none"> ■ Employee Resource ■ Group Resource ■ Team Resource 	S,A,R,U	Employee Resource Default level: S	Tasks tab of the Contact Center

System Profile Name	Description	Levels	Default Setting and Level	Affects
Customer Care: Default Category for Outbound E-mail from Contact Center	If you wish to restrict the use of eMail Center templates by Oracle Marketing Encyclopedia System (MES) product categories, then set this profile to any of the existing categories.	S,A,R,U	None	Contact Center E-mail integration See Implementing Oracle eMail Center and E-Mail Templates on page 1-90
Customer Care: Default Contact Center Service Key*	Defaults the type of service key in the Search By drop-down list in the Contact Center header. The service key is a unique identifier that can be used to quickly identify a customer in the Contact Center. Possible service keys and setting for this profile are: <ul style="list-style-type: none"> ▪ Service Request Number ▪ Instance Name ▪ Order Number ▪ RMA Number ▪ Invoice Number ▪ Contract Number ▪ Serial Number ▪ Tag Number ▪ System ▪ SSN (Social Security Number) 	S,A,R,U	Service Request Number Default level: S	Contact Center header
Customer Care: Default Country for Addresses Created in Contact Center	The default country for a new address entered in the Contact Center.	S,A,R,U	None	Contact Center header
Customer Care: Default Customer Type	This profile option sets the default value in the Caller Type field in the Contact Center Customer region.	S,A,R,U	Organization Default level: S	Contact Center
Customer Care: Default Dashboard Display by Customer or Account	Determines whether the Contact Center Dashboard tab displays account or customer information by default. <ul style="list-style-type: none"> ▪ A setting of Party displays customer information. ▪ A setting of Account displays information for the account. The View By Account check box is selected. 	S,A,R,U	Party Default level: S	Contact Center Dashboard tab

System Profile Name	Description	Levels	Default Setting and Level	Affects
Customer Care: Default Date Range for Invoices Tab	Specifies the default time period in the From Date and To fields of the Invoices tab in the Contact Center.	S,A,R,U	30 Default level: S	Invoices tab of the Contact Center See Setting Up the Invoices Tab on page 4-74.
Customer Care: Default Date Range for Orders Tab	Specifies the default time period in the From Date and To fields of the Orders tab in the Contact Center.	S,A,R,U	30 Default level: S	Modifying the Behavior of the Orders Tab on page 4-75
Customer Care: Default Date Range for View All Party Notes Page	Agents can display a list of notes for a customer in a Web browser page by clicking on the All Notes button in the Notes tab of the Contact Center. You can set this profile to specify the maximum age of notes displayed on the page.	S,A,R,U	30 Default level: S	Notes View All Party Notes Web page
Customer Care: Default Number of Records Displayed in View All Party Notes Page	Agents can display a list of notes for a customer in a Web browser page by clicking on the All Notes button in the Notes tab of the Contact Center. You can set this profile to specify the number of notes to display on the page.	S,A,R,U	10 Default level: S	Notes View All Party Notes Web page
Customer Care: Default Outcome for Interactions	This legacy system profile is not used in this release.	S,A,R,U	Request Processed	Call Wrap-up
Customer Care: Default Owner Type for Contact Center Tasks	This profile option provides a default value for the Owner Type when creating a customer-related task in the Tasks tab. The Owner Type does not display in the tab but determines which resources appear in the list of potential task owners. This system profile does not affect service request tasks. Valid values: Employee Resource, Group Resource, and Team Resource All three owner types are set up in the Resource Manager foundation module.	S,A,R,U	Group Resource Default level: S	Contact Center Tasks tab

System Profile Name	Description	Levels	Default Setting and Level	Affects
Customer Care: Default Phone Type	Defaults the phone type in the Type drop-down list for contacts created in the Create Contact window. Options are: <ul style="list-style-type: none"> ▪ Fax ▪ Mobile ▪ Pager ▪ Telephone ▪ Voice Mail ▪ Telephone/Fax 	S,A,R,U	Telephone Default Level: S	Create Contact window in Contact Center
Customer Care: Default Relationship	This profile option sets the default value in the Relationship field of the Caller Information window.	S,A	Employee of Default level: S	None
Customer Care: Default Site	Default Site Usage for new addresses in the Contact Center.	S,A,R,U	None	Contact Center Address tab
Customer Care: Default Tab for Contact Center	This profile option sets the default tab displayed when the Contact Center form is opened.	S,A,R,U	Dashboard Default level: S	Contact Center tabs
Customer Care: Default Tab for Contract Number Service Key*	Default Contact Center tab displayed when the Service Key a user enters is a contract number.	S,A,R,U	Contracts tab Default level: S	Contact Center tabs See Setting Up Service Key Search Preferences on page 4-62
Customer Care: Default Tab for Instance Name Service Key*	Default Contact Center tab displayed when the Service Key a user enters is an instance name.	S,A,R,U	Install Base tab Default level: S	Contact Center tabs See Setting Up Service Key Search Preferences on page 4-62
Customer Care: Default Tab for Invoice Number Service Key*	Default Contact Center tab displayed when the Service Key a user enters is an invoice number.	S,A,R,U	Invoices tab Default level: S	Contact Center tabs See Setting Up Service Key Search Preferences on page 4-62
Customer Care: Default Tab for Order Number Service Key*	Default Contact Center tab displayed when the Service Key a user enters is an order number.	S,A,R,U	Orders tab Default level: S	Contact Center tabs See Setting Up Service Key Search Preferences on page 4-62

System Profile Name	Description	Levels	Default Setting and Level	Affects
Customer Care: Default Tab for RMA Number Service Key*	Default Contact Center tab displayed when the Service Key a user enters is an RMA number.	S,A,R,U	Service Request tab Default level: S	Contact Center tabs See Setting Up Service Key Search Preferences on page 4-62
Customer Care: Default Tab for Serial Number Service Key*	Default Contact Center tab displayed when the Service Key a user enters is a product serial number.	S,A,R,U	Service Request tab Default level: S	Contact Center tabs See Setting Up Service Key Search Preferences on page 4-62
Customer Care: Default Tab for Service Request Number Service Key*	Default Contact Center tab displayed when the Service Key a user enters is a service request number.	S,A,R,U	Service Request tab Default level: S	Contact Center tabs See Setting Up Service Key Search Preferences on page 4-62
Customer Care: Default Tab for Social security number Service Key*	Default Contact Center tab displayed when the Service Key a user enters is a social security number.	S,A,R,U	Dashboard tab Default level: S	Contact Center tabs See Setting Up Service Key Search Preferences on page 4-62
Customer Care: Default Tab for System Service Key*	Default Contact Center tab displayed when the Service Key a user enters is an Oracle Install Base System name.	S,A,R,U	Service Request tab Default level: S	Contact Center tabs See Setting Up Service Key Search Preferences on page 4-62
Customer Care: Default Tab for Tag Number Service Key*	Default Contact Center tab displayed when the Service Key a user enters is an Oracle Install Base Tag number.	S,A,R,U	Install Base tab Default level: S	Contact Center tabs See Setting Up Service Key Search Preferences on page 4-62
Customer Care: Default Tab in Customer Search Window	Determines which tab is selected when an agent opens the Customer Search window. The options are: Basic Search and Advanced Search.	S,A,R,U	Basic Search Default level: S	Customer Search window in the Contact Center
Customer Care: Default Task Owner for New Customer Tasks	Specifies the default Task Owner for new customer-related tasks created in the Contact Center Tasks tab. This profile does not default an owner in service-request-related tasks.	S,A,R,U	None	Tasks Contact Center Tasks tab

System Profile Name	Description	Levels	Default Setting and Level	Affects
Customer Care: Default Template for Outbound from Contact Center	Set this profile to the e-mail template you wish agents to use as a default for creating E-mails. There is no seeded template available, so you must create your own.	S,A,R,U	None	Contact Center E-mail integration See Implementing Oracle eMail Center and E-Mail Templates on page 1-90
Customer Care: Default the First Customer Account in Contact Center Header	A setting of Yes defaults the first account in the Acct Num field of the Contact Center header. A setting of No leaves the field blank.	S,A,R,U	Party Default level: S	Contact Center header
Customer Care: Default Title for a Person	Defaults the title for the contact in the Contact region of the Contact Center header.	S,A,R,U	None	Contact Center header
Customer Care: Default Value for Wrap-Up Activities	Use this system profile to select the default combination of outcome, result, and reason codes for activities agents record in the Call Wrap Up window. The codes themselves and their combinations are created in Interaction History administration Web pages.	S,A,R,U	Contact Default level: S	Call Wrap Up window See Setting Up Wrap-up on page 4-53
Customer Care: Default Value for Wrap-up Interactions	Use this system profile to select the default combination of outcome, result, and reason codes that appear in the Call Wrap Up window. The codes themselves and their combinations are created in Interaction History administration Web pages.	S,A,R,U	Contact Default level: S	Call Wrap Up window See Setting Up Wrap-up on page 4-53
Customer Care: Default View in Contact Center	Default selection for the View Details for drop-down list in the Contact Center header. Options are: Customer or Contact.	S,A,R,U	Customer Default level: S	Contact Center header
Customer Care: Display Customer Search Window by Default	Setting this profile to Yes automatically displays the Customer Search window when an agent navigates to the Contact Center window. This forces an agent to perform a search of existing customers.	S,A,R,U	No Default level: S	Call Wrap Up window See Setting Up Wrap-up on page 4-53
Customer Care: Display Note Details in All Party Notes Page by Default	Agents can display a list of notes for a customer in a Web browser page by clicking on the All Notes button in the Notes tab of the Contact Center. Setting this profile to Yes displays the note details along with the note itself.	S,A,R,U	Yes Default level: S	Notes View All Party Notes Web page

System Profile Name	Description	Levels	Default Setting and Level	Affects
Customer Care: Display Only Active Accounts in Contact Center	Determines whether inactive accounts are shown in the Acct Num field LOV of the Contact Center. A setting of Yes shows only active accounts. A setting of No includes inactive accounts as well.	S,A,R,U	Yes Default level: S	Contact Center header
Customer Care: Display Only Active Customers in Contact Center	Determines whether inactive customers are shown in the Name LOV. A setting of Yes restricts the list to active customers. A setting of No includes inactive customers as well.	S,A,R,U	Yes Default level: S	Contact Center header
Customer Care: Enable Outbound E-mail from Contact Center	This profile option enables the e-mail icons on the application's tool bar. A setting of Yes, the default, enables the icons and permits users to send e-mails. A setting of No, disables the icons and functionality.	S,A,R,U	Yes Default Level: S	Contact Center E-mail integration See Implementing Oracle eMail Center and E-Mail Templates on page 1-90
Customer Care: Include Contact Profiles in Customer Profile Engine Batch Runs	Setting this profile to Yes generates data for contact-level profiles you have set up when you run the Customer Profile Engine concurrent program. A setting of No, the default, leaves out these profiles.	S,A,R,U	No Default level: S	Contact Center Dashboard tab Customer Profile Engine concurrent program See Running the Customer Profile Engine on page 4-26.
Customer Care: Make Call Wrap Up Mandatory in Contact Center*	Setting this profile to Yes makes entries in the Call Wrap Up window mandatory when agents end an interaction with a customer in the Contact Center. A setting of No makes entries optional.	S,A,R,U	Yes Default level: S	Interaction Wrap Up See Setting Up Wrap-up on page 4-53.
Customer Care: Minimum Number of Characters for Phone Search	Specifies the minimum number of phone number digits agents must enter in the Phone field in the Contact Center header when they search for a customer using the phone number. This search matches the concatenated phone number, ignoring any spaces or other delimiters. Greater number of digits improve search performance. By default, there are no restrictions.	S,A,R,U	None	Contact Center header phone number searches
Customer Care: Number of Interactions Displayed in Contact Center	Sets the number of interactions displayed in the Contact Center Interactions tab.	S,A,R,U	12 Default level: S	Contact Center Interactions tab

System Profile Name	Description	Levels	Default Setting and Level	Affects
Customer Care: Open Multiple Sessions for Dashboard Drilldown	Setting this profile to Yes makes it possible for agents to open multiple windows as they drill down on information in the Dashboard tab. A setting of No limits agents to drilling down on just one item at a time.	S,A,R,U	Yes Default level: S	Contact Center Dashboard tab
Customer Care: Permit SSN Create and Update*	Setting this profile to Yes permits agents to create and update social security numbers in the Contact Center.	S,A,R,U	Yes Default level: S	Contact Center header
Customer Care: Permit the Dashboard to be Refreshed Automatically	Setting this profile to Yes makes the application refresh the customer information on the dashboard each time an agent displays a customer. A setting of No requires the agent to click the Refresh button to update the display.	S,A,R,U	No Default level: S	Contact Center Dashboard tab data refresh rate See Overview of Customer Profile Setup on page 4-6.
Customer Care: Profile Check for Determining Customer Criticality	This profile option specifies the Profile Check the application uses to determine criticality of customers.	S,A,R,U	Critical Customers Default level: S	Dashboard tab of the Contact Center
Customer Care: Restrict Searches to a Specific Country	Specifies whether customer searches in the Contact Center are limited by default to a specific country. For example, setting this profile to France, restricts customer searches to only French customers. Agents are free to modify the default country or search all countries by deleting the entry in the Country field.	S,A,R,U	None	Contact Center header, Customer Search window
Customer Care: Start Contact Center Interactions Automatically	Setting this system profile to Yes automatically starts logging an interaction when a customer is displayed in the Contact Center. A setting of No requires the agent to click the Start Interaction icon on the tool bar. If you wish to set this profile option to Yes, then you must set Customer Care: Log Interaction in Contact Center to Yes.	S,A,R,U	No Default level: S	Interactions
Customer Care: Start Menu in Quick Menu	Default Quick Menu menu. The Quick Menu provides access to predefined application windows.	S,A,R,U	Quickmenu for Customer Support Default Level: S	Quick Menu See Setting Up Quick Menu on page 4-51.

System Profile Name	Description	Levels	Default Setting and Level	Affects
Customer Care: Turn On Interaction Logging in Contact Center	This system profile enables the logging of customer interactions in the Contact Center. A setting of Yes, the default, enables interactions. A setting of No, disables the logging of interactions.	S,A,R,U	Yes Default level: S	Interactions
Customer Care: Turn On Logging of Task Activities	Turns on logging of interaction activities for tasks. Possible values are Yes or No.	S,A,R,U	Yes Default level: S	Tasks
Customer Care: Unit of Measure Class for Time in Customer Tasks	Identifies time as the unit of measure. Do not modify the setting of this system profile.	S,A	Time Default level: S	Tasks Contact Center Tasks tab
Customer Care: Use Exact Matches in ANI Searches	This system profile is used to modify the search for a customer using customer phone number, ANI (Automatic Number Identification). A Yes setting restricts the search to exact matches improving performance. A No setting permits the application to use an inexact match.	S,A,R,U	No Default level: S	Telephony
HZ: Change Party Name	Controls an agent's ability to modify an existing customer name in the Contact Center header. A setting of Yes enables edits. A setting of No prevents edits.	S,A,R,U	Yes Default Level: S	Contact Center header
IEU: Distribute: Service Request Task: Work Source	Activates pull assignment for tasks in the Oracle Universal Work Queue.	S,A,R,U	No Default Level: S	Service Request See Automating the Closure of Service Requests on page 1-97.
IEU: Distribute: Service Request: Work Source	Activates pull assignment for service requests in the Oracle Universal Work Queue.	S,A,R,U	No Default Level: S	Service Request See Automating the Closure of Service Requests on page 1-97.
Notes: Default Note Status	Defines the default note Status for notes entered in the Notes Tab of Contact Center and in all other applications where notes are used.	S,A,R,U	None	Contact Center Notes tab
OKS: Contact Center Date Range*	This system profile lets you specify the time period in days for displaying contracts in the Contracts tab of the Contact Center.	S,A,R,U	None	Contracts Contact Center Contracts tab

System Profile Name	Description	Levels	Default Setting and Level	Affects
OTS: Minimum Number of Characters for Lookup	Specifies the number of characters agents must type in when they wish to search for a piece of collateral by name on the Collateral tab of the Contact Center. A larger number makes the search more specific and improves performance.	S,A,R,U	0 Default level: S	Collateral Contact Center Collateral tab
Service: Allow Charge Operating Unit Update	This profile determines whether agents can update the operating unit in charge lines. Valid values: Yes, No	S,A,R,U	No Default Level: S	Charges
Service: Auto Closure of Service Request	Set this profile to Yes to turn on automatic assignment of service request ownership (both upward and downward propagation). By default this profile is set to No and automatic assignment is disabled.	S	No Default Level: S	Service Requests See Automating the Closure of Service Requests on page 1-97.
Service: Auto Generate Tasks on SR Create	Use this profile to select between the two methods of automatic task generation. If you wish to automatically generate tasks based on service request type, problem code, and item mappings, then set this system profile to Task Template Mapping. If you wish to generate tasks based on additional service request attributes, then select Task Type Attribute Configuration.	S,A,R	None Default Level: R	Service Requests See Understanding Automatic Task Generation on page 3-1.
Service: Auto Launch Web Workflow	This profile enables the automatic launching of Oracle Workflow processes for service requests customers create on their Oracle iSupport Web portal. You must associate the Workflow process to be launched with the Service Request Type. A setting of Yes, enables the automatic launching A setting of No, prevents any associated Workflow processes from being launched.	S,A,R,U	No Default Level: S	Service Request Workflow Processes See Setting Up Service Request Types on page 1-15.

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Auto Launch Workflow	<p>A setting of Yes, enables the automatic launching of Oracle Workflow processes you associate with Service Request Types.</p> <p>A setting of No, prevents any associated Workflow processes from being launched.</p>	S,A,R,U	No Default Level: S	Service Request Workflow Processes See Setting Up Service Request Types on page 1-15.
Service: Auto Query service request history in the Service Request tab	<p>This profile determines whether an agent sees a list of existing service requests for a customer on the Service Request tab of the Contact Center. This profile affects what the agent sees only the first time the agent selects the tab for a specific customer.</p> <p>If set to Yes, this profile displays all current service requests for the customer.</p> <p>If set to No, the tab does not display any customer service requests.</p> <p>Both settings permit the creation and updates of service requests.</p>	S,A,R,U	No Level: S	Contact Center Service Request tab.
Service: Charges - Default Business Process from SR	<p>When you set this system profile to Yes, Charges automatically defaults the business process from the service request into the charges lines</p> <p>If you set this profile to No, the agent must always enter the business process manually.</p>	S,A,R,U	Yes	Charges
Service: Charges - Use Long List LOV for Price List	<p>Setting this profile to Yes, forces agents to enter search criteria before displaying the list of values for price lists and thus improves performance for organizations with large numbers of price lists.</p> <p>A setting of No, the seeded default, displays the short list of values format.</p>	S,A,R,U	No	Charges

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Charges Autosubmit Mode	<p>This system profile determines at what stage the charges are submitted. You can set this profile to:</p> <ul style="list-style-type: none"> ▪ When All Tasks Final This mode submits charges when all of the tasks have reached a status designated as Closed. If the automatic submission process fails for any charge line associated with the service request, none of the lines are submitted. ▪ When Service Request Final Submits charges when the service request is set to a status designated as Final. If the automatic submission process fails for any charge line associated with the service request, none of the lines are submitted. ▪ As Available Charges are submitted after the Oracle Field Service concurrent program creates them from debrief. If any line encounters errors, all subsequent charge lines for that service request are not submitted. 	S,A,R,U	When All Tasks Final Level: S	Charges
Service: Charges Book Order Automatically	<p>Set this system profile to Yes if you wish to automatically create orders in Oracle Order Management with a status of Booked.</p> <p>The default setting of No keeps the orders in the Entered status. The order must be booked before the customer is billed.</p>	S,A,R,U	No Level: S	Charges
Service: Charges Default Conversion Type	<p>This system profile specifies the default conversion type for converting the transactional currency from Service Debrief to the billing currency that is used in Charges. This is used only for expense lines.</p> <p>Possible values: Corporate, EMU Fixed, Spot, and User.</p>	S,A,R,U	Corporate Level: S	Charges

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Charges Default Sort Order	Agents can decide how to sort the charges displayed in the tab by making a selection from the Sort By drop-down list. You can set up the default value to any one of the following: <ul style="list-style-type: none"> ▪ Billing Type ▪ Charge Line Source ▪ Charge Line Status ▪ Charge Line Type ▪ Creation Date ▪ Order Number ▪ Service Activity Code 	S,A,R,U	Creation Date Level: S	Charges
Service: Collapse or Expand Service History	This profile is reserved for future use.	-	-	-
Service: CS to CSI Continue Migration With Errors	This profile is used for upgrades. Please see installation and upgrade documentation for details.	-	-	-
Service: CS to CSI Migrate Customer Products Audit Data	This profile is used for upgrades. Please see installation and upgrade documentation for details.	-	-	-
Service: CS to CSI Migrate Party Audit Data	This profile is used for upgrades. Please see installation and upgrade documentation for details.	-	-	-
Service: CS to CSI Migrate Systems All Audit Data	This profile is used for upgrades. Please see installation and upgrade documentation for details.	-	-	-
Service: CS to CSI Migration Stage	This profile is used for upgrades. Please see installation and upgrade documentation for details.	-	-	-
Service: Day Unit of Measure	Identifies a day as the unit of measure. Do not modify the setting of this system profile.	S,A	Day Default level: S	Tasks Contact Center Tasks tab
Service: Default Address Style	Specifies the default address style for addresses created from the Service Request window.	S,A,R,U	None	Service Request

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Default Assignee type on the Service Request Tasks tab	Provides the default value for the Assignee Type field when creating a Service Request task. Valid values: Employee Resource, Group Resource, Team Resource	S,A,R,U	None	Service Request Tasks tab
Service: Default Channel*	Defaults the value of the Channel drop-down list in the Service Request header. Available values are: Phone, Email, Fax, Web, and Walk-in.	S,A,R,U	Phone Level: S	Service Request header
Service: Default Contact By	This profile is reserved for future use.	-	-	-
Service: Default Contact Type	Specifies the default value for the contact type for service request creation in the Service Request window. This profile applies to service request contacts, not to customer contacts. Possible values are: <ul style="list-style-type: none"> ▪ Customer: an organization ▪ Employee: an employee of your organization ▪ Person: a consumer 	S,A,R,U	Customer	Service Request header
Service: Default Coverage for SLA	This profile specifies the contracts template used for defaulting response and resolution times into service requests that do not have an applicable contract.	S,A,R,U	None	Service Request See Setting Up Default Response and Resolution Times on page 1-96.
Service: Default Customer Name	Defaults a customer name in a new service request created in the Service Request window. You can set this profile to any customer name. This profile does not affect service requests created in the Contact Center.	S,A,R,U	None	Service Request header
Service: Default date range for SR Tab	Specifies the default time period in the From Date and To fields of the Service Request tab in the Contact Center. Enter the number of days.	S,A,R,U	None	Contact Center

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Default Email Template	This profile defaults an e-mail template for agents who create e-mails in the Service Request window. Set this profile to a default e-mail template you have created.	S,A,R,U	None	E-mail in Service Request window See Implementing Oracle eMail Center and E-Mail Templates on page 1-90.
Service: Default Group Owner for Service Requests	This profile value sets the default value of the Service Request group owner. Valid values: Any resource belonging to the Group Owner Type selected.	S,A,R,U	None	Service Request
Service: Default Group Owner Type for Service Request	This profile value sets the default value of the Group Owner Type in a service request. Valid values: Group Resource, Team	S,A,R,U	Group Resource	Service Request
Service: Default Incident Address Format	Determines the format of the incident address entered in a service request. You can have the agent enter the incident address either as text or by selecting the address from the list of existing addresses in the database. Valid values: <ul style="list-style-type: none"> ▪ Free Format Incident Address ▪ Validated Incident Address 	S	None	Entry of incident address in the service request
Service: Default Item Category Set	This profile specifies the item category set that can be used for service requests and restricts the Category field of the Service Request header to categories in that set.	S,A,R,U	None	Service Request

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Default Log tab Check Box	<p>This profile determines which check box in the Log window is selected by default. The log window is available by clicking the Log and Notes button on the Workbench tab of the Service Request window. The check boxes determine what information the window displays. The choices are:</p> <ul style="list-style-type: none"> ▪ All ▪ Audit ▪ Notes ▪ Knowledge ▪ Activity ▪ Task 	S,A,R,U	None	Service Request Log window
Service: Default New Note Type in Workbench Tab	This profile sets the default note type which appears in the Type field of the Workbench tab of the Service Request window.	S,A,R,U	None	Service Request Workbench tab
Service: Default note type for agent comments	Specifies the default note type for service requests.	S,A,R,U	None	Service Request Workbench tab
Service: Default Owner type on the Service Request Tasks tab	This profile sets the default Owner Type in the Service Request Tasks tab.	S,A,R,U	None	Service Request tasks
Service: Default Party Type	Sets the default Customer Type drop-down list value on the Service Request window header.	S,A,R,U	None	Service Request window header
Service: Default Platform Category Set	<p>This profile controls whether the Platform field displays within the Subject tab. The list of values for the Platform field will show all categories for the category set defined within this profile.</p> <p>If there is no value set, the Platform field is disabled.</p> <p>Note: The Platform field is hidden out of the box.</p>	S,A,R,U	None	Service Request

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Default Service Request Owner	Sets the default for the Owner field of a service request. The value can be any resource of type specified in the system profile Service: Default Service Request Owner Type. This profile applies to service requests created in both the Service Request window and tab.	S,A,R,U	None	Service Requests
Service: Default Service Request Owner Type	Sets the default type of owner for the Owner field during service request creation. This profile applies to service requests created in both the Service Request window and tab. Valid values include: <ul style="list-style-type: none"> ▪ Employee Resource ▪ Other Resource ▪ Partner Resource ▪ Party Resource ▪ Supplier Contact ▪ To Be Hired 	S,A,R,U	Employee Resource	Service Requests
Service: Default Service Request Severity	The default value in the Severity field for the creation of new service requests.	S,A,R,U	None	Service Requests
Service: Default Service Request Status	Use this system profile to specify the default value of the Status field during service request creation.	S,A	Working Level: S	Service Requests
Service: Default Service Request Type	Use this system profile to specify the default value of the Type field during service request creation.	S,A	Customer Service Request	Service Request
Service: Default Service Request Urgency	Use this system profile to specify the default value of the Urgency field during service request creation.	S,A	Customer Service Request	Service Request
Service: Default System Resource	This system profile specifies the dummy employee source for logging interactions in Oracle iSupport. This is required because interactions require an employee name, but Oracle iSupport service requests are logged by customers themselves.	S	None	Oracle iSupport Interactions

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Default Task Assignee on the Service Request Tasks tab	This system profile defaults a resource in the Assignee field of a service request task. The list of resources is restricted to the type you selected in Service: Default Assignee Type on the Service Request Tasks Tab.	S,A,R,U	None	Service Request Tasks
Service: Default Task Owner on the Service Request Tasks tab	This system profile defaults a task owner in new service request tasks. The owner is of the type you specify in Default Owner type on the Service Request Tasks tab.	S,A,R,U	None	Service Request Tasks
Service: Default value for restrict closure flag on service request task tab	This profile specifies the default setting of the Restrict Closure check box on the Tasks tab of the Service Request. Agents can select this check box to prevent closure of the service request when the task is not in a closed status. Setting this profile to Yes selects the check box. A setting of No, leaves the check box unselected.	S,A,R,U	-	Service Request Tasks
Service: Enable Context Search	Setting this profile to Yes enables text search in service requests.	S,A	-	Service Request Summary and Notes
Service: Enable Create Contact	When set to Yes, this profile enables the Create Contact icon in the Service Request window header as well as the Contact/Address tab, and makes it possible for agents to create new customer contacts. When set to No, the icon is disabled agents are barred from crating contacts from this icon.	S,A,R,U	No	Service Request window header
Service: Enable defaulting CC field in Email header while sending an email in Service Request form	Setting this profile to Yes, copies service request contacts in the CC fields of e-mails sent from within the Service Request.	S,A,R,U	No	Service Request E-mail
Service: Enable Edit Contact	When set to Yes, this profile makes it possible for agents to update existing customer contacts by using the Create Contact window which agents can launch via the Create Contact icon in the Service Request window header as well as the Contact/Address tab. When set to No, the icon is disabled agents are barred from updating contacts from this icon.	S,A,R,U	No	Service Request

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Enable Outbound Email in Service Request	A setting of Yes, enables agents to send e-mails from the Service Request window.	S,A,R,U		E-mail from Service Requests
Service: Enable Outbound Telephony in Service Request	A setting of Yes, enables outbound telephony from service requests.	S,A,R,U		Outbound Telephony from Service Request window
Service: Enable Service Request-UWQ Workitem Integration	Setting the profile to Yes makes it possible for agents to use the Request Work and Next Work buttons to receive work from the Oracle Universal Work Queue. Work can include both service requests and service request tasks	S	No Level: S	Service Requests Automatic Assignment See Chapter 2, "Implementing Service Request and Task Assignment".
Service: Enable Warning Messages for Impacted Tasks on Service Request Update*	<p>You can set up service requests to automatically generate tasks whenever an agent creates a service request. Which tasks get created can be based on the problem code, item, and service request type agents enter.</p> <p>Because the tasks are generated only at service request creation, an agent who changes any of these fields later may have to manually change these tasks to make them appropriate to the new purpose of the service request.</p> <p>Setting this profile to Yes, warns agents that they may need to make the manual changes. A setting of No, does not send the warning.</p>	S,A,R,U	-	Service Request tasks
Service: Field Service Transaction Organization	Oracle Field Service profile. Please see that product's documentation for details.	S,A,R,U	-	-
Service: Field Service Transaction Type	Oracle Field Service profile. Please see that product's documentation for details.	S,A,R,U	-	-

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: FORMS - Automatic Assignment of Owner	<p>Enables automated assignment of service request ownership (both push and pull) each time a service agent creates a request using Oracle TeleService.</p> <p>The available options are:</p> <ul style="list-style-type: none"> ▪ Yes Triggers automated assignment ▪ No (the default setting) Use this setting if you do not want to automatically assign request ownership each time an agent creates the request. You can run the concurrent program Automatic Assignment of Resource for Service Request take care of the automatic assignment instead. 	S	No	Service Request ownership assignment. See Setting Up Automated Assignment on page 2-16.
Service: Group Owner Mandatory	<p>Makes agent entry in the Group Owner field of the Service Request mandatory.</p> <p>If you wish to use automatic assignment to assign the Group Owner, then leave this profile set to No. Automatic assignment requires agents to leave the owner field blank, this means that setting this profile to Yes, limits automatic assignment only to those individuals within the group an agent enters.</p>	S,A,R,U	No Level: S	Service Requests
Service: Hide Contracts Region	Setting this system profile to Yes hides the Contracts information region of the Subject tab in the Service Request window.	S,A,R,U	-	Service Request Subject tab
Service: History Display Order	This system profile is reserved for future functionality.	-	-	-
Service: Hour Unit of Measure	Identifies the hour as a unit of measure.	S	-	-

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: HTML - Automatic Assignment of Owner	<p>If you have implemented Oracle iSupport, then you can use this option to enable automated assignment of service request ownership each time a customer creates a service request on the Web.</p> <p>The available options are:</p> <ul style="list-style-type: none"> ▪ Yes Triggers automated assignment ▪ No (the default setting) Use this setting if you do not want to automatically assign request ownership each time a customer creates a request. You can run the concurrent program Automatic Assignment of Resource for Service Request take care of the automatic assignment instead. 	S	No	<p>Service Request ownership assignment.</p> <p>See Setting Up Automated Assignment on page 2-16.</p>
Service: Individual Owner Mandatory	<p>A setting of Yes, requires agents to enter an individual owner in the Owner field of the Service Request header when creating a service request.</p> <p>If you wish to use automatic assignment to assign the owner, then leave this profile set to No. Automatic assignment requires agents to leave the owner field blank. This means that setting this profile to Yes effectively prevents automatic assignment.</p>	S,A,R,U	No Level: S	Service Request

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Interaction Logging Mode	<p>Determines if interactions are logged automatically in the Service Request window.</p> <p>Possible setting are:</p> <ul style="list-style-type: none"> ▪ Automatic Interaction history starts recording an interaction when agents update any field in the service request. Interactions are automatically ended when the Service Request window is closed or another customer queried. ▪ Manual Agents have to click the Start Interaction and End Interaction icons in the toolbar. ▪ No Interaction This setting disables the interactions icons in the toolbar. <p>This profile does not apply to the Service Request tab which records only one activity for each service request and associates it with the existing Customer Care interaction.</p>	S,A,R,U	Automatic Level: S	Service Requests
Service: Inventory Validation Organization	Use this profile to specify the inventory organization for the items against which service requests can be created. This setting restricts service requests only to items from that organization. Valid values are all inventory organizations.	S,A,R,U	None Level: S	Service Requests
Service: Item Flexfield	<p>Use this system profile to select the Oracle Inventory Key Flexfield structure you wish to use when displaying items from inventory.</p> <p>The recommended value is MSTK.</p> <p>You must set this profile even if you are not using Oracle Inventory.</p> <p>Valid values: Any Oracle Inventory key flexfield defined for table MTL_SYSTEM_ITEMS_B.</p>	S,A	None	Service Request

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Jeopardy: Reaction Date Buffer (in Days)	Reserved for future release. Specifies the number of days before a service request is considered in jeopardy when your organization fails to respond by the date specified in the Respond By field.	S,A,R,U	-	Service Request
Service: Jeopardy: Resolution Date Buffer	Reserved for future release. Specifies the number of days before a service request is considered in jeopardy when your organization fails to resolve the customer issue by the date specified in the Resolve By field.	S,A,R,U	-	Service Request
Service: Jeopardy: Resolution Date Buffer (in Days)	Reserved for future release.		-	-
Service: Jeopardy: Response Date Buffer	Reserved for future release.		-	-
Service: Jeopardy: Task Calendar End Date - Effort Buffer	Reserved for future release.		-	-
Service: Jeopardy: Task Calendar Start Date Buffer	Reserved for future release.		-	-
Service: Make Call Wrap Up Mandatory in Service Request	Setting this system profile to Yes requires agents to make entries in the Call Wrap Up window when completing interactions with customers in the Service Request window. A setting of No, makes entry optional.	S,A,R,U	-	Service Request Call Wrap Up window See Setting Up Wrap-up on page 4-53
Service: Make Contact Mandatory	Setting this system profile to Yes requires agents to enter a service request contact when creating a service request. A setting of No makes entry optional.	S,A,R,U	-	Service Request
Service: Make Group or Individual Owner Mandatory	Setting this profile to Yes makes entry of the service request owner mandatory when creating a service request. A setting of No makes assignment mandatory.	S,A,R,U	No	-

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Manual Modifier	Agents using Oracle Order Management's Sales Order Line Items Pricing Tab can accidentally override prices entered in Charges when they select the Calculate Price check box. This causes prices to be recalculated for orders in the Entered state and overrides the prices entered in Charges by applying the modifiers associated with the price list. Set this system profile to a dummy manual modifier you have set up to prevent this behavior.	-	None	Charges
Service: Migration Organization for Employee Service Requests	Organization to which all the pre-11.5.6 Service Requests created for caller_type 'Employee' is migrated	S,A,R,U	-	Service Request
Service: Navigate to Contact Center or Telesales	This profile determines which window displays when agents clicks the Contact Center /eBusiness Center icon in the Service Request toolbar. This icon includes an image of an arrow. Valid Values: Contact Center or eBusiness Center	S,A,R,U	Contact Center Level: S	Service Request toolbar
Service: Note Type for Task Generation Failure	You can use this profile to specify the note type for error messages generated by the application when automatic creation of tasks fails.	S,A,R,U	None	Error messages generated by tasks
Service: Publish Flag Update Allowed	Setting this system profile to Yes, permits agents to select the Publish check box on a service request, thus making the request available for customers to view via Oracle iSupport.	S,A,R,U		Service Request
Service: Quantity used to compute Task planned end date.	This profile is used to compute the planned end date based on the planned start date for a task associated to the service request. The unit of measure is day.	S,A,R,U	None Level: A	Service Request
Service: Renewal Default Order Type	Default order type for Renewal operation of Transact Service front_end form	S, A	-	Service Request

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Restrict Installed Base for location validation	Specifies whether the Oracle Install Base item is restricted to addresses associated with the customer who owns the product or can have any address in the database. Possible values: HZ_LOCATIONS (all addresses) and HZ_PARTY_SITES (customer addresses).	S	-	Service Request header
Service: Restrict Installed Base list by Account	Setting this system profile to Yes, restricts the items in the Instance list of values to items belonging to the account specified in the service request. A setting of No, lists all items for the customer.	S,A,R,U	-	Service Request
Service: Rows Displayed in History	Reserved for future use.	-	-	-
Service: Service Request Auto Close Status	This profile is used to specify the status you wish to apply for a service request that has been closed automatically	S,A,R	None	Service Request
Service: Service Request Creation Item List filter	Reserved for future use.	-	-	-
Service: Service Request Default Tab	This profile is used to default the tab selected when an agent creates a service request in the Service Request window. Valid values: <ul style="list-style-type: none"> ▪ Addresses ▪ Charges ▪ Contact and Addresses ▪ Contacts ▪ First Custom Tab ▪ Interactions ▪ Log ▪ Maintenance Requests ▪ Related Objects ▪ Second Custom Tab ▪ Service History ▪ Subject ▪ Tasks ▪ Workbench ▪ Workorders 	S,A,R,U	Workbench	Service Request

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Service Request Default Tab for Update	<p>This profile is used to default the tab selected when an agent displays a service request in the Service Request window.</p> <p>Valid values:</p> <ul style="list-style-type: none"> ▪ Addresses ▪ Charges ▪ Contact and Addresses ▪ Contacts ▪ First Custom Tab ▪ Interactions ▪ Log ▪ Maintenance Requests ▪ Related Objects ▪ Second Custom Tab ▪ Service History ▪ Subject ▪ Tasks ▪ Workbench ▪ Workorders 	S,A,R,U	Workbench	Service Request
Service: Service Request Duplicate Time Frame	Set this system profile to the time duration you wish the application to use for duplicate checking when a service request is created. The time duration is dependent on the unit of time you choose in Service: Service Request Duplicate Time Frame UOM.	S,A,R,U	30 Level: R	Service Requests See Setting Up Automatic Duplicate Checking for Service Requests on page 1-58
Service: Service Request Duplicate Time Frame UOM	Use this system profile to set the unit of time you wish to use for duplicate checking.	S,A,R,U	Day Level: R	Service Requests See Setting Up Automatic Duplicate Checking for Service Requests on page 1-58

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Service Request First Tab	<p>This profile sets the tab displayed when an agent opens the Service Request window to create a new request.</p> <p>Valid values:</p> <ul style="list-style-type: none"> ▪ Addresses ▪ Charges ▪ Contact and Addresses ▪ Contacts ▪ First Custom Tab ▪ Interactions ▪ Log ▪ Maintenance Requests ▪ Related Objects ▪ Second Custom Tab ▪ Service History ▪ Subject ▪ Tasks ▪ Workbench ▪ Workorders 	S,A,R,U	Workbench Level: S	Service Request window
Service: Service Request Owner Auto Assignment Level	<p>This profile determines the level of autoassignment for service requests. A setting of Individual assigns ownership to a group and to an individual. A setting of Group assigns ownership to a group only.</p>	S,A,R	Individual Level: S	<p>Service Request ownership assignment.</p> <p>See Setting Up Automated Assignment on page 2-16.</p>
Service: Service Request Task Owner Auto Assignment Level	<p>This profile determines the type of owner assigned to a service request task. A setting of Individual assigns ownership to an individual resource. A setting of Group assigns ownership to a group.</p>	S,A,R	Individual Level: S	<p>Service Request Task Ownership Assignment.</p> <p>See Setting Up Automated Assignment on page 2-16</p>

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Service Request Task Tab Owner Field Optional	A setting of Yes makes the Task Owner field optional. When an agent does not make an entry, this automatically triggers the task assignment functionality (both pull and push models) at the time the task is saved. The application automatically assigns the owner.	S,A,R,U	Yes	Service Request Task Ownership Assignment. See Setting Up Automated Assignment on page 2-16
Service: SR UWQ Group Label	Makes it possible to substitute a different word for Group in the different Universal Work Queue categories.	S,A,R,U	None	Universal Work Queue
Service: SR UWQ My Label	Makes it possible to substitute a different word for My in the different Universal Work Queue categories.	S,A,R,U	None	Universal Work Queue
Service: SR UWQ Team Label	Makes it possible to substitute a different word for Team in the different Universal Work Queue categories.	S,A,R,U	None	Universal Work Queue
Service: Subject Prefix for Outbound Email in Service Request	Setting this profile to Yes causes the application to populate the Subject line of the e-mail to be populated with the problem summary from the service request. The application defaults the subject line only when agents launch the compose window from the Service Request window. Setting this profile to No leaves the subject line blank.	S,A,R,U	-	E-mail sent regarding service requests See Implementing Oracle eMail Center and E-Mail Templates on page 1-90.
Service: System Generated Service Request Number	This profile determines if the service request number is entered by the agent or system-generated. A setting of Yes, generates the number automatically. A setting of No, forces the agent to enter it manually.	-	-	Service Request
Service: Task Auto Close Status	This system profile determines the status of tasks automatically closed by the application with the downward propagation method.	S,A,R	None	Service Requests See Automating the Closure of Service Requests on page 1-97
Service: Time Span for Notes	Sets the number of days for displaying service request notes.	S,A,R,U	-	

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: UPG Bill to Country Code	This profile is used for upgrades. See upgrade and installation documentation for details.	S,A,R,U	-	-
Service: UPG Default Employee for Interactions	This profile is used for upgrades. See upgrade and installation documentation for details. This system profile is used for upgrading Interactions from version 3i to 11i. The employee you enter used as the default resource whenever employee_id column is null in 3i.	S,A,R,U	-	-
Service: UPG Install Country Code	This profile is used for upgrades. See upgrade and installation documentation for details.	S,A,R,U	-	-
Service: UPG Ship to Country Code	This profile is used for upgrades. See upgrade and installation documentation for details.	S,A,R,U	-	-
Service: Upgrade Batchsize	This profile is used for upgrades. See upgrade and installation documentation for details.	S,A,R,U	-	-
Service: Use Business Process ID in Service Request Auto Assignment	This profile value indicates whether to use Business Process ID in the automatic assignment of a service request. A setting of Yes limits the search for preferred resources to those associated with the Customer Support business process A setting of No returns all preferred resources as possible service request owners.	S,A,R	-	Service Request Ownership Assignment. See Setting Up Automated Assignment on page 2-16
Service: Use Business Process ID in Service Request Task Auto Assignment	This profile value indicates whether to use Business Process ID in the automatic assignment of a service request tasks. A setting of Yes limits the search for preferred resources to those associated with the Customer Support business process A setting of No returns all preferred resources as possible task owners.	S,A,R	-	Service Request Task Ownership Assignment See Setting Up Automated Assignment on page 2-16

System Profile Name	Description	Levels	Default Setting and Level	Affects
Service: Use List of values for Order Number	Agents can restrict Oracle Install Base searches to a specific order by entering the order in the Order field of the Search Installed Base window. Setting this profile to Yes, includes all orders of the customer in the list of values. A setting of No, makes the entry free text.	S,A,R,U	-	-
Service: User Currency Code	User currency for multi-currency conversions.	S,A,R,U	US Dollar Level: S	Charges
Service: Valid Bill/Ship To Relationship Types	Reserved for future use.	-	-	-
Service: Valid Incident Address	Reserved for future use.	-	-	-
Service: Validate and Auto Close on Service Request Closure	Set this profile to Yes, to enable downward propagation method of service request closure.	S	No Level: S	Service Requests See Automating the Closure of Service Requests on page 1-97.
Service: Visual Attribute for Setting Color for SR Number if SR is Escalated	This system profile assigns a color to the Service Request Number field when the Service Request is escalated. Valid values: Dark Blue, Dark Green, Dark Red, Light Blue, Light Green, Light Red, Medium Blue, Medium Yellow, Medium Green, Medium Red	S,A,R,U	Light Red	-
Service: Workflow Administrator	This profile specifies the employee resource who is to received notifications from any failed Oracle Workflow process within Oracle TeleService.	S,A,R,U	None	Workflow
Services: Check for Duplicate Service Requests	A setting of Yes, turn on duplicate checking. A setting of No disables it.	S,A,R,U	No Level: S	Service Requests See Setting Up Automatic Duplicate Checking for Service Requests on page 1-58

System Profile Name	Description	Levels	Default Setting and Level	Affects
Services: Check for Similar Service Requests	<p>This profile turns on potential duplicate checking based on Item Instance or Serial Number.</p> <p>When this profile is set to Yes, an agent selecting an Instance in a service request receives a list of all service requests for that same instance that may be potential duplicates.</p> <p>A setting of No, disables this functionality.</p>	S,A,R,U	No Level: S	Service Requests See Setting Up Duplicate Checking by Item Instance or Serial Number on page 1-64

System Profile Name	Description	Levels	Default Setting and Level	Affects
<p>Services: Service Request Duplicate Criteria</p>	<p>Use this system profile to select the type of duplicate check you wish to use.</p> <p>If you wish to enable duplicate checking by customer and item alone, then select one of the following:</p> <ul style="list-style-type: none"> ■ Item Instance/Customer, Item, Serial Number Select this setting if your organization uses serial numbers when logging service requests against items. The application checks duplicates on either the instance or the combination of customer, item, and serial number. ■ Item Instance/ Customer and Item Select this option if you do not use serial numbers for logging service requests against items. The application checks for duplicates on either instance or a combination of customer and item. ■ Extended Attributes and Incident Address Select this option if you wish to enable duplicate checking based on extended attributes and the incident address alone. <p>If you wish to enable duplicate checking using both types of check, then select one of the two following options:</p> <ul style="list-style-type: none"> ■ All with Serial Number Performs both type of duplicate checks with the serial number. ■ All without Serial Number Performs both type of duplicate checks without the serial number. <p>To enable your selection you must set Services: Check for Duplicate Service Requests to Yes.</p>	<p>S,A,R,U</p>		<p>Service Requests</p> <p>See Setting Up Automatic Duplicate Checking for Service Requests on page 1-58.</p>

System Profile Name	Description	Levels	Default Setting and Level	Affects
Task Manager: Default Priority	Specifies the default value of the Priority field for new tasks created in the Tasks tab of the Contact Center. This default also applies to tasks in all applications.	S,A,R,U	Medium Default level: S	Tasks
Task Manager: Default Task Status	Specifies the default value of the Status field for new tasks created in the Tasks tab of the Contact Center. This default also applies to tasks in all applications.	S,A,R,U	Open Default level: S	Tasks
Task Manager: Default Task Type	Specifies the default value for the Type field for new tasks created in the Tasks tab of the Contact Center. This default also applies to tasks in all applications.	S,A,R,U	Breakfast Default level: S	Tasks

F.2 Obsolete System Profiles

The following table lists system profiles obsoleted in this release.

System Profile Name	Description	Levels	Default Setting and Level	Affects
Customer Care: Default Outcome for Interactions	This legacy system profile is not used in this release.	S,A,R,U	Request Processed	Call Wrap-up
Customer Care: Default Reason for Interactions	This legacy system profile is not used in this release.	S,A,R,U	Already Gave Default level: S	Call Wrap-up
Customer Care: Default Result for Interactions	This legacy system profile is not used in this release.	S,A,R,U	Sale Default level: S	Call Wrap-up
Customer Care: Service Request form Check	This legacy system profile determines whether the application opens the Service Request form or the Comms Service Request form.	-	-	Service Request

