

Oracle® Customer Support

User Guide

Release 11i

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Oracle Customer Support User Guide, Release 11i

Part No. B19112-01

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Preface

Intended Audience

Welcome to Release 11i of the *Oracle Customer Support User Guide*.

This guide is intended for support agents using Oracle Customer Support.

See Related Documents on page viii for more Oracle Applications product information.

TTY Access to Oracle Support Services

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Structure

1 Oracle Customer Support Overview

- 2 Understanding Work Selection Models**
- 3 Working With Service Requests**
- A Setting Default Profile Values and Security**

Related Documents

The following are the documents related to Oracle Customer Support:

- *Oracle TeleService User Guide*
- *Oracle TeleService Implementation Guide*
- *Oracle Knowledge Management User's Guide*
- *Oracle Common Application Components User's Guide*
- *Oracle Field Service User Guide*
- *Oracle Applications User's Guide*

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

Oracle Customer Support Overview

This chapter covers the following topics:

- Introduction

Introduction

Oracle Customer Support is an HTML-based application designed for support agents. It enables an agent to efficiently capture, route, escalate, and resolve incidents reported by customers. The key features include work list, service request management, knowledge management, customer management, tasks, service level agreements, and analytics.

Oracle Customer Support is built on the Oracle Application (OA) Framework and offers ample flexibility in configuring and personalizing the application.

Work List

The work list is where the agent finds new or existing service requests on which to work.

Oracle Customer Support provides the following work selection methods:

- **Automated Work Selection:** The service requests are assigned to the agent based on assignment manager rules.
- **Queued Work Selection:** Agents prompt Oracle Customer Support for the next service request that needs to be assigned.
- **Manual Work Selection:** Agents look through a list of service requests and explicitly pick the service requests on which to work.

The agent is presented with a work list that is appropriate and optimized for the assignment method used in the implementation. Using the work list, the agent can quickly identify the next service request that needs to be worked on next.

See "User Interface Components", page 2-1 for additional details.

Service Request Management

Oracle Customer Support enables you to manage and update existing service requests, perform a search for an existing service request, and create new service requests.

While managing and updating service requests, you can work more efficiently due to the following features:

- **Logical and easy to read service log:** This enables you to quickly read and understand the history of the service request.

- **Configurable sub-tab structure:** Using the Oracle Applications (OA) Framework, the administrator can easily hide fields that are not relevant. The fields that are relevant can be easily categorized and displayed in a sub-tab structure that best represents your business process.
- **Out-of-the-box integrations:** Features such as related objects and install base service history enable you to quickly relate other business objects that would be the subject of a particular service request, upload attachments that are relevant to the issue described in the service request and track the history of an instance of a product.

Knowledge Management

Through integration with Oracle Knowledge Management, Oracle Customer Support enables the enterprise to be more efficient in solving customer problems. You can quickly search for the known problems and solutions. If a solution is found in the repository, then the solution can be linked to the service request and be provided to the customer for immediate resolution.

You also have the option of creating a new solution if a new problem is discovered.

Service Level Agreements

Oracle Customer Support enables the enterprise to define and track service-level agreements and guidelines for resolving customer issues. This capability enables the enterprise to set the customer's expectations on the amount of time to respond to a new issue logged by the customer and the amount of time to resolve the issue logged by the customer.

Reporting and analysis can then be conducted to determine where improvements are required to provide more efficient service in terms of responding to and resolving issues.

Tasks

Oracle Customer Support enables you to create tasks that are required to solve the customer's issue. These tasks can be assigned to other agents and are tracked through the service request. Changes to these tasks, such as "task complete," are visible to the owner of the service request. You can drill down to the details of the task when necessary.

Search

To help you locate a service request, Oracle Customer Support provides simple and advanced search options.

Analytics

Oracle Customer Support provides you with the analytics of your performance. With this capability, you can see how well you, and other agents, responded to and resolved customer issues. Also, you can get a running count of how many service requests have been resolved and the quality of the resolutions.

Agent Dashboard

The Agent Dashboard page is the Oracle Customer Support home page. The key regions include the following:

- **Search region:** In this region, you can perform a simple or advanced search for service requests.
- **Analytics (Key Performance Indicators tool):** The Key Performance Indicators area in the Agent Dashboard page is where you view statistical information describing how well you resolved service requests in relation to your peer group. You pick the

time period (last 7, 30, 90, or 365 days) and the severity of the service request that you want to run your comparison. The Key Performance Indicators area displays the comparison between you and your group based on the parameters.

- **My Links tool:** Your administrator can also configure links for Web sites that are most often used by your service organization. (This is similar to using a favorites list in your Web browser.)

Understanding Work Selection Models

This chapter covers the following topics:

- Introduction
- User Interface Components
- Work Selection Models

Introduction

Oracle Customer Support provides service organizations multiple ways of automating work assignments. The application assigns service request ownership either to work queues or directly to individuals based on a variety of parameters, such as contracts, installed base, service territories, and availability of the agents. Based on their business process, a service organization can set up the work selection model that they want their agents to follow. The three work selection models that organizations typically follow are the following:

- Manual Work Selection - Assigned to Agent

Agents select the next Service request to work on from a list of Service Requests that are assigned to them.

- Manual Work Selection - Assigned to Work Queue

Agents select the next Service Request to work on from a list of Service Requests that are assigned to all the work queues they are a member of.

- System-based Work Selection

Agents prompt the application to deliver the service request that they need to work on next.

The work selection model determines the appearance and functionality of the Agent Dashboard page.

User Interface Components

The work selection models determine which of the following interface components appear in the Agent Dashboard page:

- My Service Requests

Oracle Customer Support displays service requests that are already assigned to an agent and which are not yet closed.

- Unassigned Service Requests

Oracle Customer Support displays all the service requests that are not yet assigned to an agent, but are assigned to any of the work queues of which the agent is a member.

- **Make Available (Unavailable)** button

This button is used to notify Oracle Customer Support that you are available to receive work. (This button becomes **Make Unavailable** when your status is "Available".) When you are available, you can receive service request assignments and when you are unavailable, you cannot. This feature is useful for when you want to go to lunch, are not working on a certain day, or any other time you are not available to receive service request assignments.

- **Get Next Work** button

Oracle Customer Support tracks all the service requests that are assigned to an agent (both complete and incomplete) and those that are assigned to the agent's work queue(s). The application selects the service request that is the most critical or in danger of not meeting the scheduled completion date. If the agent is not an owner of this service request, then Oracle Customer Support also assigns this service request to the agent. The agent receives the service request in the Update Service Request page when he or she clicks **Get Next Work** in the Agent Dashboard page.

Work Selection Models

Manual Work Selection - Assigned to Agent

The Agent Dashboard page displays all service requests assigned to you. You can pick which service request on which you want to work. Additionally, this model enables you to specify your availability by using the **Make Available** button.

Manual Work Selection - Assigned to Work Queue

The Agent Dashboard page displays all the service requests assigned to you and those assigned to all the work queues (unassigned service requests) of which you are a member. From the Unassigned Service Requests area, you can indicate which service request that you want assigned to yourself. A service request can be assigned to you as long as no one else already owns it. If the service request is already assigned, then a message appears indicating this. Once the service request is assigned to you, Oracle Customer Support opens it in the Update Service Request page.

System Based Work Selection

The Agent Dashboard page displays the service requests assigned to you along with the **Get Next Work** button.

By default, the Agent Dashboard page displays the System Based Work Selection model where My Service Requests and Get Next Work components are used.

Working With Service Requests

This chapter covers the following topics:

- Updating a Service Request
- Viewing the Service Request Log
- Understanding Service Request Dates, Contractual Information, and Default Service Level Agreement
- Viewing Install Base Service History
- Understanding Notes
- Adding and Viewing Service Request Notes
- Searching for Notes by Text
- About Searching the Knowledge Base and Suggesting Solutions
- Searching the Knowledge Base and Suggesting Solutions
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- Specifying the Type of Action for the Service Request
- Closing a Service Request

- Creating a Service Request Based on Customer Information
- Creating a Service Request Based on an Existing Service Request
- Creating a Service Request Based on a Customer Item
- Creating a Service Request Based on Employee Information
- About Assigning Ownership of Service Requests
- Updating the Service Request Ownership Manually
- Understanding Automatic Service Request Ownership
- Creating A Customer
- Creating a Contact
- Updating a Contact
- Updating Contact Information
- Updating Customer Information
- Understanding Install Base Information
- Creating an Item Instance
- About Searching for Service Requests

Updating a Service Request

This section describes the full capability of the service request update process. Depending on your organization's business process, you would follow some or all of the procedures described in this section.

Updating a service request can involve the following:

- Understanding the customer issue, contract and dates, and the customer profile
- Understanding the history of the customer issue.
- Researching the customer issue by examining the knowledge base.
- Resolving the customer issue by making the necessary additions to the service request:
 - Related service request
 - Related objects
 - Attachments
 - Linked solutions
 - Tasks
- Updating or adding contact information, addresses, and instance information.
- Adding a note to a service request
- Closing the service request

Understanding the Update Service Request Page

You update a service request in the Update Service Request page. The basic information that describes the service request, known as header information, is located at the top of the page.

Tabs

In the Update Service Request page, there are six possible tabs available in the application. Out of the box, Oracle has modelled a standard business process with four tabs configured: History, Entitlement and Deadlines, Problem and Diagnosis, and Resolution and Wrap Up. For the Oracle Customer Support application that you are using, these tabs may be renamed if your administrator decided to change the tab names. Additionally, your administrator may have configured the tabs to best reflect your organization's business process and the number of tabs can vary.

Panels

- Service Information

This panel contains important information that can help you determine how to process the service request. For instance, this panel may alert you to the type of contract the customer has or if a contact person is no longer available.

If no important information is available for a service request, this panel may not appear in the Update Service Request page.

- Primary Contact

In addition to the contact information, you can also update the customer information in this panel.

- My Links

In this panel, you can access the work-related links that your administrator may have established.

- Search Knowledge

In this panel, you can initiate a Knowledge Management search.

Understanding Service Request Header Information (Type, Status, and Problem Type)

Typically, the type of service request is already known when you access a service request. The status and problem type selections are contingent on the service request type. For example, if the service request type is for hardware, then the options available for problem type could be "noisy" and "jams" while the available statuses could be "fixed" and "replaced."

Viewing the Service Request Log

Access the service request log to view all the updates made to a service request. Oracle Customer Support automatically updates the service request log each time updates are made to the service request and its related objects.

An entry in the service request log consist of a time stamp and the name of the person making the service request update.

Notes

- The Service Request Log displays service request information either in a summary or detailed format, depending on what you specify. In the summary view, only the first 240 characters of all notes are visible. In the detailed view, the entire note text is visible
- The service request log is arranged chronologically and is limited to fifty entries. (You can change the order to reverse chronological.) If more than fifty entries exist, then the **More** button appears in the log. When you click the **More** button, the whole log appears.
- Press the **End** button on your keyboard to quickly jump to the bottom of the Update Service Request page to add a service request note.

Understanding Service Request Dates, Contractual Information, and Default Service Level Agreement

There are several dates in Oracle Customer Support.

- **Expected Response Date**
The date by which you would need to respond to the customer.
- **Expected Resolution Date**
The date by which you would need to resolve the customer problem.
- **Date Created**
The date that the service request was created. This date is system-generated and therefore is not editable.
- **Date Last Updated**
The date that the service request was last updated. This date is system-generated and therefore is not editable.
- **Incident Date**
The date that the customer problem occurred. This date could be in the past. For example, a customer could call an agent the day after his product fails. The agent records the incident date using yesterday's date.
- **Reported Date**
The date the incident was reported.
- **First Responded Date**
The date that the customer was first contacted to either get more details or to propose a solution.
- **Date Resolved**
The date that the service request was closed. See "Closing a Service Request", page 3-14.

To change a date, open the Update Service Request page and from the Entitlement and Deadlines tab, change the desired date. Alternatively, you can click the calendar icon next to the date field to open the calendar window where you can choose a date.

Contractual Information

When a service request is created based on a combination of information such as customer, service request type, and item, then the contract and the expected response and expected resolution dates automatically default. (These obligation dates represent the Service Level Agreement (SLA) that the company has with the customer.) However, it is possible through a combination of circumstances that you would need to change some obligation dates, the default contract, or choose a new contract altogether.

Additionally, your service organization may have a standard time policy for resolving issues, depending on the type and severity of the issue, independent of customers. The policy is the default SLA of the service organization and also populates the obligation dates.

Jeopardy

Any service request that is in danger of not being addressed and resolved by the dates determined through service level agreements is considered in jeopardy. Using the appropriate profile options, your administrator can define how much time is necessary to respond to and resolve the service request before it is considered in jeopardy. Visual indicators appear in Oracle Customer Support to indicate that the service request is in jeopardy. In the Agent Dashboard page, the due date will be in red and in the Update Service Request page, the Service Information panel will display a warning message.

Viewing Install Base Service History

While researching the customer problem, Oracle Customer Support enables you to view the service request history for a customer product (item instance). This preparation can help you to diagnose the customer problem.

Note: If an item instance is transferred from one customer to another, Oracle Customer Support will not display service requests from the previous owner.

Steps:

1. From the Update Service Request page, click the Problem and Diagnosis tab.
2. In the Service Requests for Item Instance area, click the Service Request hyperlink to see a read-only view of the service request.

Note: If there is no service request history for a customer product, then the Service Requests for Item Instance area is not present in the Problem and Diagnosis tab.

Understanding Notes

You can use notes to do the following:

- Communicate to fellow agents working to resolve the customer problem.
- Keep personal notes.
- Enter additional search terms for knowledge base searches.
- Communicate with customers who use Oracle iSupport to review their service requests. See the *Oracle TeleService User Guide* for more details.

After you save a note you cannot edit or delete it, but you can change its type and status. All notes that you create in a service request are automatically linked to the

service request, so they are not visible to agents viewing the customer record in the contact center.

The status of a note indicates who can view the note. The following are the note statuses:

- **Private:** Only the note creator can view the note.
- **Public:** All agents with access to the service request can view the note.
- **Publish:** All agents with access to the service request can view the note as well as customers who review the service request using Oracle *iSupport*.

Adding and Viewing Service Request Notes

Oracle Customer Support enables you to create a note for an existing or new service request. The application also enables you to see all the notes created for a service request.

Notes

- Since creating a note for a new service request is done during the creation of a new service request, create this note from the Create Service Request page.
- To create a note for an existing service request, open the Update Service Request page and specify the appropriate information.
- To view a summary listing of notes, open the Update Service Request page, ensure that the History tab is selected, and then click the desired note hyperlink.

Searching for Notes by Text

From either the Agent Dashboard page or Update Service Request page, go to the Search Knowledge panel and specify the target note words.

About Searching the Knowledge Base and Suggesting Solutions

Oracle Customer Support enables you to search the knowledge base for a service request solution. You can perform a simple or advance search of the knowledge base in the following ways:

- Independent of any service request
This search is conducted from the Agent Dashboard page.
- Within a service request
This search is conducted from the Update Service Request page.

For complete details on searching the knowledge base with various options such as advance search and others, see the *Oracle Knowledge Management User's Guide*.

Note: If you perform a search from the Agent Dashboard page, this search does not have any service request context.

If an Oracle *iSupport* user searches the knowledge base for solutions before creating a service request and cannot find a solution, and then decides to log a service request; each of the solutions that the Oracle *iSupport* user views is automatically linked to the service request.

Search Criteria

When you search the knowledge base from the Update Service Request page, Oracle Customer Support uses the following information you have entered as search criteria:

- Keywords and phrases you enter as the problem summary
- Item or installed base item you have entered in the service request
- Any notes of types that are mapped to Oracle Knowledge Management. By default, these note types are: Symptom, Cause, Action, Changes, and Objective.
- Solutions and the existing service requests

Search Results

All the critical information from the search is listed in the Solutions tab and Service Requests tab of the Simple Search Result page.

Solution Tab

The Solutions tab lists all the potential solutions for the service request while the Service Requests tab list all the related service requests. You can view each solution and then rate its usefulness using the following:

- **Yes:** Indicates the solution helped you to solve the problem. This selection increases the ranking of a solution on subsequent searches.
- **No:** The solution did not help you. This decreases the ranking of this solution on subsequent searches.
- **Maybe:** You or the customer has not tried the solution, but you want to suggest it as a potential solution.

Specifying **Maybe** or **Yes** makes the solution visible to the customer on the Oracle iSupport Web portal.

If your organization has set up the appropriate automatic e-mail notifications, the customer contacts for the service request will receive e-mails alerting them of the suggestion that you choose.

Service Request Tab

The Service Requests tab lists all the related service requests. You can view each service request and then decide if and how you want to relate it to the service request. See "Understanding Service Request Relationships", page 3-8.

Other Tabs

The Solution Categories tab is used to organize your solution search results. The Forum tab is used to converse search results with other interested parties. See the *Oracle Knowledge Management User's Guide* for complete details.

Searching the Knowledge Base and Suggesting Solutions

Prerequisites

- Oracle Knowledge Management must be implemented.

Steps:

1. From the Update Service Request page, go to the Search Knowledge panel and then ensure that the Knowledge Search radio button is selected.

2. Specify the appropriate search information.
3. From the Simple Search Result page, view the solutions in the Solutions tab, the related service requests in the Service Requests tab, and then link the desired service request back to the original service request. See "Adding a Related Service Request", page 3-10.

Viewing Suggested Solutions for a Service Request

Use this procedure to view suggested knowledge base items linked to service requests.

To view suggested solutions, click the appropriate tab from the Update Service Request page and then view the linked solution(s) in the Linked Solutions area.

The Linked Solutions area describes the solution within Oracle Knowledge Management:

Notes

- **Usefulness:** Indicates the solution has been tried and proven useful to agents.
- **Title:** Lists the solution title.
- **Visibility:** Indicates whether the solution can be viewed by customers in Oracle iSupport.
- **Published:** Indicates the date in which the solution was linked to the service request.

Linking a Suggested Solution to a Service Request

You can link a suggested solution to a service request from either the Actions drop-down list or from the Linked Solutions area, both found in the Update Service Request page.

Note: You can view an audit trail in the service request log that shows when a solution has been linked or unlinked to a service request. The log shows the solution number, type, title, and statements.

For complete details on linking a suggested solution to a service request, see the *Oracle Knowledge Management User's Guide*.

Understanding Service Request Relationships

You can use relationships to 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. For each service request, you can indicate multiple relationships to other service requests and Oracle E-Business Suite objects, such as maintenance plans, invoices, orders, and the like.

Because a relationship between two objects is reciprocal, the relationships come in pairs. When you specify a relationship, Oracle Customer Support automatically supplies the reciprocal relationship for the object you are linking to:

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

In addition to supplying the reciprocal link, two of the relationship pairs also affect the status of one or both of the service requests:

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

For example, if you specify that requests A and B are caused by service request C, then closing C closes A and B as well.

The following are the three most frequently used relationship types:

Relationship

Caused by

Action

Linking service request A to service request B using a “Caused by” relationship indicates that A is caused by B.

Oracle Customer Support does the following:

- Sets the status of A to “Waiting”.
- Creates the reciprocal link “Root Cause of” for B.

When B is set to the status of “Closed”, then the status of A is automatically set to “Clear”. If multiple service requests are “Caused by” B, then all are set to “Clear”.

Example

Problem:

A customer contact calls to say his e-mail is not working. The support agent discovers that the 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.

Resolution:

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”.

When the 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”.

Relationship

Duplicate of

Action

Linking service request A to service request B with the “Duplicate of” relationship indicates that A is a duplicate of B.

Oracle Customer Support automatically does the following:

- Creates an “Original for” link from B to A.
- Changes the status of A to “Closed” with the resolution code of “Closed as Duplicate”.

Example

All call center agents have been notified of the e-mail outage. Subsequently, an employee logs a ticket to report the e-mail outage.

The agent who is assigned to work on the service request identifies it as a duplicate and enters the “Duplicate of” link.

Oracle Customer Support automatically closes the employee’s service request with a resolution code of “Closed as Duplicate” and with a reference to the service request already logged for the e-mail outage.

Relationship

Refers to

Action

If service request A “Refers to” service request or document B, this means that B has information relevant to A.

The application automatically creates the reciprocal “Reference for” relationship from B to A provided both documents are service requests.

Example

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.

Adding a Related Service Request

This section describes how to link a service request that is closely related to one that you would like to update.

Steps:

1. From the Update Service Request page, click the Problem and Diagnosis tab.
2. From the Related Service Requests area, click **Add Another Row** and specify the service request relationship.

If you cannot find a particular service request that you want to relate, then select **Search for Similar** from the Actions drop-down list and then specify the appropriate criteria in the Search For Similar page.

Adding a Related Object to a Service Request

In many cases, the service request could be related to other objects defined in the E-Business Suite, such as quality plans and maintenance orders. You can only use the "Reference for" and "Refers to" relationship types to link service requests to other E-Business Suite objects.

Steps:

1. From the Update Service Request page, click the Problem and Diagnosis tab.
2. Click the arrow in the Related Objects area and then click **Add Another Row**.

Adding an Attachment to a Service Request

The following are the types of service request attachments:

- **File:** This file could be anything from a word processor file to a spreadsheet or graphics file.
- **URL:** This URL can be any web site that helps resolve the service request.
- **Text:** This is free text that you type in the application.

To add an attachment to a service request, click the Problem and Diagnosis tab in the Update Service Request page and then specify the appropriate information.

The attachment is visible to the customer on the Oracle *iSupport* Web portal.

About Managing Service Request Tasks

This section describes how to create and manage service request tasks, which are the units of work required to fulfill the service request. For example, you can create a task to call back a customer about the service request or a task for a service technician to make a repair at a customer site.

The task functionality in Oracle Customer Support is provided by the Tasks module, which is a part of the Oracle E-Business Suite foundation.

See the *Oracle Common Application Components User's Guide* for more information about managing tasks.

Understanding Automatic Task Generation

When you create a service request, the application can automatically generate tasks to help resolve customer problems. This makes it possible for you to schedule a repair on the first call, rather than having the dispatcher call the customer back.

Automatic task generation is most useful for known problems that have standard resolutions. If you 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 Tasks area of the Update Service Request page of and must be assigned and scheduled by the agent handling the service request or through automatic assignment.

You can automatically generate tasks based on a combination of the service request type, 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.

Automatic task generation must be set up by your administrator. See the *Oracle TeleService Implementation Guide*.

Creating a Task

Prerequisites

- A service request must first exist.

Steps:

1. From the Update Service Request page, click the Resolution and Wrap Up tab.

2. From the Tasks area, specify whether you want to create a task based on a task type or on a template.
3. Depending on how you are creating the task, specify all the necessary task information in either the Create Task page or Create Tasks Using Template page.

Note: If you need to dispatch a field service technician to resolve the customer problem, then create a task of type "Dispatch". See the *Oracle Field Service User Guide*.

Updating a Task

Steps:

1. From the Update Service Request page, click the Resolution and Wrap Up tab.
2. From the Task area, click the pencil icon for the desired task.
3. In the Update Task page, specify any task information.

Adding a Note to a Task

Adding a note to a task is a useful way of communicating with fellow agents and even customers regarding the condition of a task.

Prerequisites

- A service request and task must already exist.

Steps:

1. From the Update Service Request page, click the Resolution and Wrap Up tab.
2. In the Task area, open the desired task.
3. In the Update Task page, complete the note information.

See "Adding and Viewing Service Request Notes", page 3-6.

About Address Updating

After you open a service request, you may discover that a billing, shipping, or incident address is either missing or incorrect. In either case, you can use the procedures in this section to complete the address information.

Updates for addresses are made in the Entitlement and Deadlines tab of the Update Service Request page.

Note: Oracle Customer Support supports global address formats for the Billing Information area and Shipping Information area of the Update Service Request page.

Understanding the Incident Address

The *incident address* is the location of the customer problem. You can either select the address from those already in your database or enter it as text. The incident address can be used as follows:

- To filter item instances. You will see only instances that are located at the incident address within the Item Instance list of values.
- To dispatch field technicians. If there are any field service dispatch tasks for the service request, the incident address is used for dispatching field technicians.
- To enter a one-time address.
- To default the covered site, if there is no item instance.

Notes

- An *existing incident address* is a permanent address that is already in Oracle Customer Support.
- A *new incident address* is a one-time address recorded with the service request. For example, a new incident address may be used for servicing a sales person's laptop computer at a location other than his work location.
- Typically, the incident address defaults to the current location of the problem or the default address of the primary contact of the service request. However, you can modify this default address or enter a new one.

Entering and Updating Billing Information and Shipping Information

This section describes how to update and enter the customer shipping and billing addresses.

Note: Since the procedures for updating billing and shipping information are identical, they are explained together in this section.

Typically, the shipping and billing information defaults to the incident address. However, there are cases when you may need to change the shipping or billing information.

Notes

- From the Agent Dashboard page, you can click **Get Next Work** to open the next available service request.
- For billing information, you can create and update the information. For shipping information, you can only create a new address.

Specifying the Type of Action for the Service Request

In the Update Service Request page, select from the Action drop-down list the action that you want to perform on the service request. The following table describes the possible actions.

Actions	Description
Assign to Me	This is the default option. This option assigns the service request to you. Ensure that this option is selected to prevent others from modifying the service request while you are making edits.
Copy Service Request	This option enables you to make a copy of an open service request, which can be used as the basis for a new service request.
Create Solution	This option enables you to add a linked solution to the service request, which is recorded in the Knowledge Base for future reference.
Search for Similar	This option enables you to search for a service request similar to the one that you want to create or update.
Snooze and Next	This option enables you to work on a different service request without closing the existing one.

Closing a Service Request

All actions in this section are optional and depend on your organization's business practices.

Oracle Customer Support determines a list of valid resolution codes based on the values entered in the service request. The following are some of the rules and validations:

- Unmapped resolution codes always appear in the Resolution Code list of values. Unmapped resolution codes are generic and apply to all request types, products, product categories and problem codes.
- If an item, but no item category has been selected for the service request, the application will look for all resolution codes that are valid either for the item, or for any of the item categories, of which the item is part.
- If no resolution codes have been identified after evaluating all resolution code mapping criteria, the list of values shows all unmapped resolution codes defined in the system.
- If the resolution code becomes invalid after updating some of service request's attributes, the resolution code will be cleared, and you must select a new, valid, resolution code.

Note: Resolution codes can be based on one or more of the following criteria: service request type, item category, item and problem code.

Your administrator can set up the application to do the following:

- Automatically cancel tasks that are open and not being worked on, upon closing the service request.

When a service request is closed, the application performs defined validations and cancels any open tasks that are scheduled for a future date.

- Automatically close service requests

When all work on service request tasks is done and all charge lines have been submitted to order management for billing, the application closes the service request unless a defined exception condition exists.

For information on setting up the automatic closure of tasks and service requests, refer to the *Oracle TeleService Implementation Guide*.

To close a service request, set the status of the open service request to a closed status in the Update Service Request page. Oracle Customer Support removes the closed service request from the listing in the Agent Dashboard page. If your organization uses resolution codes, then select one using the Resolution Code list of values. If necessary, enter a resolution summary.

Creating a Service Request Based on Customer Information

Steps:

1. From the Create Service Request area in the Agent Dashboard page, ensure that the Use existing Service Request Identifier radio button is selected.
2. Select the customer service identifier you want to use to locate the customer such as customer name or account number.

If the customer is contacting you for the first time, enter the person or organization into Oracle Customer Support. See "Creating a Customer", page 3-17.
3. Specify the search information.
4. From the Create Service Request page, specify the service request information.

Creating a Service Request Based on an Existing Service Request

Use this procedure when there is an existing service request closely related to the customer problem that you are trying to describe. Using this procedure can save you a significant amount of data entry.

Steps:

1. From the Agent Dashboard page, open the desired service request.
2. From the Update Service Request page, select **Search For Similar** from the Actions drop-down list.
3. From the Search For Similar page, specify the search criteria for the desired service request.
4. Again from the Update Service Request page, select **Copy Service Request** from the Actions drop-down list.
5. Enter or change the necessary information in the Create Service Request page.

Note: In the Agent Dashboard page, you can also create a new service request based on an existing one by specifying a service request number in the Create Service Request area.

Creating a Service Request Based on a Customer Item

Use this procedure when details about the customer item are available, such as service tag or serial number. By specifying this information, Oracle Customer Support is able to retrieve some useful customer information for you automatically, such as location of the item and any contract details.

Steps:

1. From the Create Service Request area in the Agent Dashboard page, ensure that the Use existing Service Identifier radio button is selected.
2. From the Search Key drop-down list, select the appropriate instance service identifier.
3. In the Value field, type the customer item information.
If you do not know the customer item information, then open the Search and Select window and locate this information.
4. From the Create Service Request page, enter or change the necessary information in the Create Service Request page.

Creating a Service Request Based on Employee Information

In internal help desk flows, the agent typically services employees of an organization. In this case, the entry point would typically be the employees phone number, employee e-mail, or the employee number.

Steps:

1. From the Create Service Request area in the Agent Dashboard page, ensure that the Use existing Service Identifier radio button is selected.
2. From the Search Key drop-down list, select the appropriate employee service identifier.
3. In the Value field, type the employee information.
If you do not know the employee information, then open the Search and Select window and locate this information.
4. From the Create Service Request page, enter or change the necessary information.

About Assigning Ownership of Service Requests

The agent who owns a service request is responsible for the satisfactory resolution of the service request. Service request ownership is unrelated to task ownership; therefore, assigning a service request does not assign any of the related tasks.

You can choose to assign a service request to yourself, you and your group, or have Oracle Customer Support automatically assign a service request to an agent. In order to assign a service request to a group or another agent, these individuals must have access to the Service Request Type defined in the Resource Manager application. Which ownership you decide to assign depends on your organization's business practices. Some organizations may prefer to assign work to the group and permit individual agents to take ownership themselves based on their work load and availability; other organizations may prefer to assign service requests to agents directly.

Assigning a service request to a service agent results in the service request being listed in the My Service Requests table of the Agent Dashboard page. Assigning a service request to a group results in the service request being listed in the Unassigned Service Requests table of the Agent Dashboard page.

- All members of a group see a service request assigned to that group in the Unassigned Service Requests table in the Agent Dashboard page, if there is no individual specified
- An agent who has been assigned a service request, sees the service request in the My Service Requests table

Your administrator can set up automatic notifications to alert agents when a service request has been added to their work queue. For more information, see the *Oracle TeleService Implementation Guide*.

You can assign service request ownership either manually or have Oracle Customer Support make the assignment. Service requests are assigned to either groups or individuals within your organization.

Updating the Service Request Ownership Manually

Steps:

1. From the Agent Dashboard page, open the desired service request.
2. From the Update Service Request page, click the Entitlement and Deadlines tab.
3. From the Request Details area, specify a group or individual owner.

Note: If you select a group owner, then the possible individual owners are limited to the members of that group.

Understanding Automatic Service Request Ownership

If your organization has implemented automatic assignment of service requests, you can have the application assign service request ownership to groups and individuals automatically, using the automatic assignment and work-load balancing feature of Oracle Customer Support.

The automatic assignment process starts immediately after a service request is created. Service requests that have been updated are assigned by a concurrent program your administrator must set to run on a regular basis.

Automatic assignment takes the skills and work load of each individual service agent into account when identifying the optimal owner. See the *Oracle TeleService Implementation Guide*.

Oracle Customer Support automatically populates any empty ownership fields.

Creating A Customer

If the customer is contacting you for the first time, then you need to create either a person or organization record for this customer before you can create the service request. For example, in a business-to-business flow, you would create an organization and in a business-to-customer flow, you would create a person.

Steps:

1. From the Agent Dashboard page, select the Use New Service Information radio button in the Create Service Request area.
2. Specify whether the record is for a new person or organization.
3. Depending on your selection, specify all the necessary information from either the Create Organization page or Create Person page.

Creating a Contact

If Oracle Customer Support prompts you that a specified contact does not exist, then you can create a new contact record.

Notes

- A contact name may already exist in the Name field if you based the service request on customer information (customer name, customer number, or customer phone). In this case, the customer's primary contact defaults.
- When you add the new contact to a service request, specify that the contact is a customer contact in a business-to-customer flow and specify the contact is an employee contact in an internal-support flow.
- You may need to create a new person or organization and then make this individual or organization the contact for a service request.

Steps:

1. From the Primary Contact panel in either the Create Service Request page or Update Service Request page, click **Update Contact**.
2. From the Update Contact page, click **Create**.
3. From the Create Contact page, specify the new contact information.

Updating a Contact

You can view the contact information for a service request from the Primary Contact panel. With this information, you can call the contact for any additional details and if any information needs to be updated, you can also do this.

Notes

- **Contact By:** This is the means by which you communicate with the contact person. E-mail and the telephone are two examples.
- **Add Another Row:** Click to add another contact person to the service request.
- **Pencil icon:** Click to update the contact information. You can also update the contact information by clicking the contact link in the Primary Contact panel.

Steps:

1. From the Update Service Request page, click **Update Contact** in the Primary Contact panel.
2. From the Update Contact page, specify the new contact information.

Updating Contact Information

Steps:

1. From the Update Service Request page, click the Customer link in the Primary Contact panel.
2. From the Update Contact Information page, specify the contact information.

Note: From the Update Contact page, you can also access the Update Contact Information page.

Updating Customer Information

Steps:

1. From the Update Service Request page, click the Customer link in the Primary Contact panel.

Depending on the update, this page can either be the Update Organization page or Update Person page. Both pages are quite similar.

2. From Update Organization page or Update Person page, make the appropriate updates.

Understanding Install Base Information

An *install base* is the serviceable products at a company site. An *item instance* is an occurrence of one of these serviceable products. For instance, all the PCs at a company could be the install base with each PC being an item instance.

Creating an Item Instance

There are times when a customer requires service for a product that is not yet tracked in an install base. In this case, create an item instance in the customer install base.

Notes

- **Calendar icon:** Alternatively, you can click the calendar icon next to the date field to open the calendar window where you can choose a date.
- From the Update Service Request page, you can go to the Item Instance page and update an item instance.
- When a customer item is relocated, you may want to update the item install base to reflect this.

Steps:

1. From either the Create Service Request page or Update Service Request page, click **Create Item Instance**.
2. From the Create Item Instance page, specify all the necessary item instance information.

About Searching for Service Requests

Oracle Customer Support enables you to search for a service request using various criteria. You can choose to do either a simple or advanced search. Conduct each search from the Agent Dashboard page.

Simple Search

Use a simple search when minimal information is required to locate the desired service request(s).

Advance Search

Use advance search when you want to locate a single or multiple service requests. The advance search offers you extensive flexibility which enables you to be quite specific in naming your search criteria. When naming your search criteria, you can specify service request attributes, free text, and dates. You can use any combination of these or just one or two of them.

Attributes criteria

To specify multiple pieces of information in a search criteria field, you need to click the flashlight icon near the field and in the Search and Select window, select the desired information. Oracle Customer Support then adds the specified information as read-only text to the search criteria field. To change this information, click the flashlight icon near the field and then make changes in the Search and Select window.

Using the Add Attributes drop-down list, you can be more specific in your search by adding more service request attributes to the Advanced Search page. For example, if you specify "Jeopardy", Oracle Customer Support adds the Jeopardy drop-down list to the Advanced Search page. You can add as many additional search attributes as you like.

Free-text criteria

You can do a free-text search that includes all, any, or exact phrases. Oracle Customer Support searches on service request summary statements and notes.

Dates criteria

You can search on all the dates found in a service request. You can specify a range of dates or a single date for a particular event. Likewise, you can specify dates for multiple events. For example, you can specify the from and to dates for the incident while only specifying a single expected resolution date.

You can click the calendar icon next to the date field and choose a date from the calendar window.

Setting Default Profile Values and Security

This appendix covers the following topics:

- Setting Default Values for Profiles
- Service Request Security

Setting Default Values for Profiles

Typically, the administrator sets the profile values in Oracle Customer Support. However, the following table lists some of the profiles that you can set. Oracle Customer Support uses these profiles to automatically populate a service request with ownership information. This automation speeds up service request creation and updating.

Profile	Description	Default Setting
Service: Default Group Owner for Service Requests	Sets the default group owner for a new service request. Valid values are any resource belonging to the group owner type selected.	Group Owner
Service: Default Task Owner on the Service Request Tasks Tab	Sets the default task owner for a new service request. The owner is of the type that you specify in Default Owner type on the Service Request Tasks tab.	None

Service Request Security

Service products can optionally have data security enabled, which restricts the data that users can access. With security enabled, users can create, view, or update only those service requests types to which they have access. Enabling security impacts all service product flows at the site level. Service data security is turned off by default.

Your administrator can restrict by responsibility, which users can create and access what types of service requests and related information. In order to set up security, your administrator will need to map responsibilities to Service Request Types and then enable security. For information on setting up service request security, refer to the *Oracle TeleService Implementation Guide*.

If the standard service security is enabled and your responsibility is not mapped to a particular service request type:

- You cannot create, view, or modify any service request associated with that service request type. This includes service request related data such as tasks, notes, or interaction history.

Note: It is possible to no longer have access to a service request or service request task, to which you previously had access. For example, the following can happen:

- Your administrator could change the setup so that you no longer have access to the Service Request Type for a given service request.
- Another agent could change the Service Request Type for a given service request to a Service Request Type, to which you do not have access.

If this happens and you need access, you should contact your administrator.

- You cannot view the relationships of a service request to other service requests, of that type.
- You are also excluded from the lists of resources that other agents use to assign service request ownership and tasks for that Service Request Type.

When service security is enabled, it secures service request data not just in Oracle Customer Support, but in all applications that use service requests. The following are examples of how some of the flows are affected when service security is enabled and your responsibility is not mapped to a particular Service Request Type:

- You cannot view other service requests that are related to a service request if these other service requests are of that type.
- When searching for related service requests in Oracle Knowledge Management, the search will not bring up service requests that are of that type.
- When viewing service request history for a customer's product in Oracle Install Base, you will not be able to see service requests of that type.

