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Oracle iSupport Implementation and Administration Guide, Release 12.2

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle iSupport Implementation and Administration Guide.*

This guide is intended for personnel who are responsible for implementing and administering the Oracle iSupport application.

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

- The principles and customary practices of your business area

- Oracle iSupport

- JTT

  To learn more about JTT applications, refer to the *Oracle E-Business Suite CRM System Administrator's Guide*.

- The Oracle Applications graphical user interface

  To learn more about the Oracle Applications graphical user interface, read the *Oracle E-Business Suite User's Guide*.

See Related Information Sources on page xvi for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Structure

Related Information Sources

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

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.

- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.

- **Oracle Electronic Technical Reference Manual -** The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Projects (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent programs.

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

Oracle Advanced Pricing Implementation Guide

This guide show you how to define pricing rules that service the pricing requirements of Oracle applications. Pricing rules control the pricing actions that are applied to customer transactions such as price lists, price agreements, formulas, and modifiers. With Oracle Advanced Pricing, you can attach qualifiers to a price list that enables an item have more than one price list. You can also set up block pricing, promotional limits, multiple currency conversion, and multiple contexts per sales order.

Oracle Advanced Pricing User's Guide

Oracle Advanced Pricing calculates prices including promotional prices for Oracle Order Management and other Oracle Applications based on pricing rules, pricing relationships, item hierarchies, usage brackets, and deals and promotions.

Oracle Marketing Implementation Guide

Oracle Marketing provides the tools necessary to automate the planning, budgeting, execution, and tracking of your marketing initiatives. It provides a single repository of customer information that enables you to analyze, personalize, refine, and target your campaigns to better align with sales. You can set up fatigue rules to define contact limits by time period and by channel.

Oracle Marketing User Guide

This guide tells you how to create marketing programs, execute campaigns across multiple customer interaction channels such as Web, email, direct mail, and telemarketing, and monitor the performance of these programs. With Oracle Marketing, you can generate prospective customer lists and assess the effectiveness of these lists, and manage marketing collateral and marketing budgets.

Oracle Receivables User Guide

This guide provides you with information on how to use Oracle Receivables. Use this guide to learn how to create and maintain transactions and bills receivable, enter and apply receipts, enter customer information, and manage revenue. This guide also includes information about accounting in Receivables. Use the Standard Navigation Paths appendix to find out how to access each Receivables window.

Oracle Trade Management Implementation Guide

This guide provides detailed functional and integration setup information for Oracle Trade Management, which can be used by technical consultants, application administrators, and implementation team members.

Installation and System Administration

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

Oracle E-Business Suite Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, or contemplating significant changes to a configuration. After describing the

Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle E-Business Suite CRM System Administrator's Guide

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle E-Business Suite Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12.2, or as part of an upgrade to Release 12.2.

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

Oracle E-Business Suite User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

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 E-Business Suite Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Projects 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 E-Business Suite Diagnostics User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests in the Oracle E-Business Diagnostics framework.

Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite

services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Projects and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Projects working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite

automatically checks that your changes are valid. Oracle E-Business Suite 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.

1

Introduction to Oracle iSupport

This chapter covers the following topics:

- Oracle iSupport Overview
- Users
- Oracle iSupport Homepage
- Service Request
- Knowledge Base
- Technical Library
- Account Management
- Products Repository
- Customer Communications
- Business Flows
- User Profile
- User Management
- Multi-Party Access
- Site Management
- Configurability

Oracle iSupport Overview

Oracle iSupport is an Internet-based customer support application that enables service organizations to provide self-service customer support online.

Oracle iSupport drives service profitability by decreasing the number of calls coming into the contact center. This secure self-service web portal gives customers and employees immediate customer service 24x7. Its sophisticated knowledge management system provides the information needed to solve problems, leading to increased

customer satisfaction.

Key benefits:

- Enables organizations to provide targeted support to their users by utilizing the multiple sites capabilities

- Enables customers and employees to solve problems themselves through a searchable knowledge base

- Reduces agent-assisted contacts with customers by giving them the ability to review and track orders, payments, shipments, contracts, returns, and repair orders

- Saves costs by enabling customers to register their products, manage their product configurations, and create and track product returns

- Provides complete customer care through integration with Oracle E-Business Suite applications

Users

Oracle iSupport supports these types of users:

- Primary User is a business customer user (B2B) and has privileges to manage users belonging to his organization.

- Business User (business to business (B2B))

- Individual User (business to consumer (B2C))

- Oracle Applications System Administrator

- Oracle iSupport Administrator

- Employee User: Employee of the service organization

  Oracle iSupport supports only those employee users who access Oracle iSupport to request service and to meet their support needs. Oracle iSupport is not intended for support agents.

  Employee users access Oracle iSupport through a responsibility with a feature set that provides self service to workers in an enterprise.

- Contingent Worker: Contingent worker in the service organization

  All workers in an enterprise can be categorized either as employees or contingent workers. Employees are workers who are directly employed by the enterprise, paid by payroll, and eligible for benefits. By contrast, contingent workers, or contractors, by which they are more commonly known, are workers who do not have a direct

employment relationship with the enterprise. They may perform work for the enterprise as part of a commercial relationship that exists between the enterprise and a supplier. Thus they are paid by accounts payable to either an agency that then employs them or directly to the contractors if they are self-employed. They also may perform work for the enterprise if they are interns or volunteer workers and thus have no relationship with a supplier.

Contingent workers access Oracle iSupport through a responsibility with a feature set that provides self service to workers in an enterprise.

- Knowledge Management Administrator User

Users are classified into user types for self registration purposes. User types can be defined to meet the specific needs of an implementing organization. For details about the setup of user types, refer to User Management, page 1-12.

Oracle iSupport Homepage

The Oracle iSupport home page provides links to other support areas and functions. Users can personalize the content and the layout of this page according to their preferences.

A user can view alerts and other system messages published by the merchant, links to service requests, knowledge base, and content from MES. The user also has the option of having the contents of his home page e-mailed to him; this is known as home page subscription.

A merchant can use the home page setup capabilities to provide access to different content (bins) to different sets of users. The merchant has the option of making some home page content mandatory.

For more information, see the Setting up iSupport Homepage topic area in this guide's *Implementation Tasks* chapter.

A typical business scenario is:

- Customer logs in to Oracle iSupport and access the Homepage (the initial landing page).

- Customer views Alerts, company news, or other content provided by the administrator.

- Customer accesses Content hyperlink to personalize content.

- Customer accesses Layout hyperlink to personalize the layout of content.

- Customer selects Edit hyperlink on Service Request Quick Links, Service Request (saved views), and/or Quick Links bins to personalize the content of these bins.

Service Request

Oracle iSupport enables users to manage their service request activity online. This functionality is available if the merchant sets up the service request functionality detailed in the chapter, *Integrating Oracle iSupport with Service Request*. Additional support features can be realized by implementing Oracle Knowledge Management and the products and returns features. See the chapters, *Integrating Oracle iSupport with Oracle Knowledge Management* and *Integrating Oracle iSupport with Products and Returns* for more information.

After the service request information has been entered, it is validated by Oracle TeleService and assigned a unique tracking number for future reference. Merchants can enforce product selection and/or knowledge base searching during the service request process. Merchants can configure the service request creation flows and the various service request interfaces based on context.

An administrator can configure the service request creation flow based on the context of application, responsibility, service request type, or a combination of responsibility and service request type, giving the service organization a very high level of flexibility. A global content also exists for use by the service organization and to ensure backward compatibility with previous releases.

With the configurable service request interface feature, an administrator can control the display of regions and attributes, based on the context values mentioned above, on a service request page during creation or update. For example, a merchant can show or hide regions and attributes, make fields required or not, and move selected sections among pages. This functionality utilizes the AK regions repository for storing the metadata.

A typical business scenario is:

- Customer logs in to Oracle iSupport.

- Customer queries the knowledge base directly for troubleshooting help prior to creating a new request.

- Customer selects the type of the problem (service request type) being experienced.

- Customer accesses the Create Service Request page and enters contact and service request detail information. Customer may also attach any type of file(s) to the service request.

- After the service request is submitted, the system returns a tracking number to the customer. At the end of the service request submission process, customers have the option of adding the service request link to the Homepage, and/or having the service request details sent to the e-mail address that is set up in their Personal Profile.

- After service request submission, customers can view, close, update, attach additional files, and/or conditionally re-open their closed service requests. The user can escalate the service request if the progress of service request resolution does not meet expectations.

- The user can also save the information entered by him in creating this service request as a service request template. The user can use the saved data to create future service requests.

Knowledge Base

Oracle Knowledge Management implementation allows access to the known problems/solutions database, and permits users to locate technical documents, including white papers, user guides, and FAQs. The merchant benefits by increased knowledge among customers and reduced call center activity. The Oracle Knowledge Management user interface is easy to use and features flexible search and browse capabilities. For additional information, see the *Oracle Knowledge Management Implementation and Administration Guide* and *Integrating Oracle iSupport with Oracle Knowledge Management* chapter of this guide.

A typical business scenario is:

- Customer logs in to Oracle iSupport. Customer views Alerts and Company News on the Homepage.

- Customer accesses the knowledge base from the Homepage or by using the Support page.

- Customer user browses the knowledge.

- Customer uses either basic or advanced search functions to locate answers.

- Customer views solution detail, and can add a link to the Homepage if desired.

- The service organization can provide access to different knowledge to different sets of users by utilizing the knowledge security feature.

Technical Library

With the Oracle Marketing Encyclopedia system (MES), an organization can manage content of different types. This content may include, for example, white papers, user guides, and frequently asked questions. Oracle iSupport leverages this repository to provide access of this content to users. For example, guest users can view documents listed under the MES category tied to the guest user responsibility on the Technical Library page.

The Technical Library provides integrated searching and browsing of MES content

capabilities to users. Users can only browse and search the content made accessible by the merchant to them based on setup. This functionality is available to all types of users including the guest users.

Account Management

Oracle iSupport's optional account management functionality allows customer users to view detailed transaction history and status, and to create returns. Integration with Oracle Order Management, Oracle Shipping, Oracle Payables, Oracle Receivables, Oracle Install Base, Oracle Depot Repair, and Oracle iStore applications allows a user to view orders, invoices, payments, and shipping information, as well as to create return material authorizations (RMAs). Integration with Oracle Service Contracts, if these optional modules are implemented, provides a view of contracts, entitlements, service programs, and warranties.

If all required applications are implemented, this functionality allows customers to service their own account needs. For more information, see the chapter *Integrating Oracle iSupport with Products and Returns*. For setting up Contracts functionality, refer to *Oracle Contracts Implementation and Administration Guide*, and *Oracle Service Contracts Implementation Guide*.

A typical business scenario is:

- Customer user logs in to Oracle iSupport.

- Using the Accounts tab, the customer user has online, real-time access to information regarding account data, including:

  - Orders

  - Shipments

  - Invoices

  - Payments

  - Contracts

  - Returns

  - Products that the user owns

  - Repair Orders

Products Repository

Oracle Install Base is a repository of products owned by a customer, including purchase

date, product attributes, and applicable service agreements. Oracle Install Base maintains information about purchased products in a tree structure showing all of the parent and child assemblies. It allows users to drill down to view detailed product information. Oracle Install Base tracks, updates, and maintains product configurations whenever a new part or component is installed or replaced. Oracle Install Base also allows users to register their products online. It also allows the grouping of customer products into systems for ease of service. Oracle Install Base tracks serialized and non-serialized products, and provides powerful search capabilities. Support organizations benefit from having customers who are informed about their transaction and product histories and applicable contracts.

Required integration with Oracle Inventory, as well as optional integration with Oracle Bills of Material, further facilitate access to product information. With Products functionality, users can manage and track products themselves online, thus decreasing calls to customer service centers and increasing customer control over management of product information. For more information, see the chapter *Integrating Oracle iSupport with Products and Returns.*

A typical business scenario is:

- Customer logs in to Oracle iSupport.

- Customer accesses the information about the products that he owns from the Products tab.

- Customer reviews product details and/or adds products to Oracle Install Base.

Customer Communications

The Web call-back (Call Me) feature allows customer users to submit call-back requests through the Internet with the Oracle iSupport user interface. The Surveys feature allows service organizations to gather relevant customer feedback.

A service organization can run real-time, dynamic, and targeted campaigns on Oracle iSupport to up sell, cross sell, and dramatically increase revenues and build customer loyalty. Integration of Oracle iSupport with Oracle Marketing (eMerchandizing) delivers personalized content to the Oracle iSupport user interface based on pre-defined campaigns. The right campaign is shown to a customer user based on defined campaigns and their audience, rule set, and postings. An audience segment is a group of users. For example, users who live in New York belong to the New York segment tied to campaigns. The campaign message defined in Oracle eMerchandizing can be displayed by the merchant on various Oracle iSupport pages using the sections provided on these pages.

If a merchant has implemented the multiple sites capabilities in Oracle iSupport, these messages can also be displayed in bins on the site dashboard, through the use of the Oracle iStore template manager functionality.

The out-of-the-box display templates that are candidates for marketing postings

include:

- Section page bins

- Item page bins

- Shopping cart page bins

Business Flows

This section contains end-user business flows to provide an overview for implementers and administrators.

The business flow called Click to Inquiry: Service Requests and Their History has the following general scenario:

Log in with your user name and password.

1. View your service requests.

2. Optionally, review service request history.

The business flow called Click to Inquiry: Dispatch Status has the following general scenario:

Log in with your user name and password.

1. View your service requests.

2. Optionally, review service request history.

3. Optionally, confirm your address.

4. Review the status of resolution actions (field service tasks).

5. Optionally, add a note.

6. Optionally, request an escalation.

The business flow called Click to Inquiry: Returns Status has the following general scenario:

Log in with your user name and password.

1. View your service requests.

2. Optionally, review service request history.

3. Review the status of returns.

4. Optionally, add a note.

5. Optionally, request an escalation.

The business flow called Click to Inquiry: Repair Status has the following general scenario:

Log in with your user name and password.

1. View your service requests.

2. Optionally, review service request history.

3. Review the status of repairs.

4. Optionally, add a note.

5. Optionally, request an escalation.

The business flow called Click to Inquiry: Confirm Charges has the following general scenario:

Log in with your user name and password.

1. View your service requests.

2. Optionally, review service request history.

3. Review the status of repairs.

4. Confirm charges.

5. Close the service request.

The business flow called Click to Issue for Field Service has the following general scenario:

Log in with your user name and password.

1. Optionally, describe the problem and the product.

2. Optionally, view the knowledge base.

3. Optionally, view potential solutions.

4. Optionally, indicate if solutions are useful.

5. Identify the product or instance.

6. Identify the request type and urgency.

7. Optionally, answer questions regarding the problem.

8. Optionally, upload attachments.

9. Optionally, confirm contact information.

10. Confirm incident, billing, and shipping addresses.

11. Review the service request.

12. Optionally, create a service request.

13. Review confirmation information.

14. Optionally, e-mail the service request details to yourself.

15. Optionally, bookmark the request search.

The business flow called Click to Non-Resolution has the following general scenario:

Log in with your user name and password.

1. View your service requests.

2. Optionally, review service request history.

3. Add a note.

The business flow called Click to Resolution: Issue Resolved has the following general scenario:

Log in with your user name and password.

1. View your service requests.

2. Optionally, review service request history.

3. Optionally, view potential solutions.

4. Optionally, indicate if the solutions are useful.

5. Optionally, review attachments.

6. Close the service request.

7. Provide a closure reason.

The business flow called Click to Resolution: Issue Not Resolved has the following general scenario:

Log in with your user name and password.

1. View your service requests.

2. Optionally, review service request history.

3. Optionally, view potential solutions.

4. Optionally, indicate if the solutions are useful.

5. Optionally, review attachments.

6. Add a note to change the status to Unresolved.

7. Optionally, request an escalation.

User Profile

The Oracle iSupport System Administrator or Primary User can administer a wide range of user profile data, including:

- Changing/Resetting Password

- Adding/Changing Contact Points (Phone/Email/Fax)

- Adding/Changing Address Information

- Setting General Preferences

- Changing Default Responsibility

- Changing Default Customer Account

- Setting up Home Page E-mail Subscription

- Setting User Signature for Forums

- Adding/Changing Company Information

- Viewing Administrator Information

While using the multiple sites framework in Oracle iSupport, a system administrator or a primary user cannot perform some of these functions for other users. The functions that they cannot perform are as follows:

- Changing a user's contact points and addresses

- Setting general preferences

- Changing default responsibility

- Setting up a user's signature for forums

User Management

User management is the process of approving the self service registration requests of users or creating user accounts for existing party contacts to enable them to access applications. Thereafter, user management maintains the user in the system by granting or revoking privileges, accounts, customer profile information, and party relationships based on a set of business requirements. User management involves registering new users, modifying existing users, approving or rejecting user registration requests, setting up enrollments and registration templates, assigning users to business accounts, and more. Oracle CRM Technology Foundation (JTT) supplies the technology stack for performing most of the background setups and processes for user management.

Oracle iSupport uses the user management pages of the Oracle iStore application. Oracle iStore provides a comprehensive set of user management capabilities, including the ability to register users, configure registration pages, approve users, and manage user profile information. This functionality leverages the JTT user management framework as a foundation for the setup, which includes the user types, enrollments, and approval processes. Thus, the primary user has access to the Oracle iStore user management pages including:

- Contact and User Management

- Pending User Approvals

- Role Management

- Site Assignment

- Enrollment Management

- For details of user management with sites, refer to the *Oracle iStore Implementation and Administration Guide*.

> **Note:** The information in this section is meant to give you an overview of the concepts of the JTT user management framework. You can find specific and comprehensive information in the *Oracle E-Business Suite CRM System Administrator's Guide*.

The JTT user management framework has four main components:

User Types, page 1-13

1. Enrollments, page 1-16

2. Templates at user-type level and enrollment level, page 1-17

3. Approval Process, page 1-18

User Types

Users are classified into user types for registration purposes. User types are defined to meet the specific needs of an organization, and they reflect a broad category of users. User types allow flexible, extendible ways to define, categorize, and implement the behavior of users. User types can be tied to enrollments (subscription services), default responsibilities, and default roles.

The following sections discuss seeded user types that pertain to Oracle iSupport, including:

- Primary User (organization contact), page 1-13

- Business User (business to business (B2B)), page 1-14

- Individual User (business to consumer (B2C)), page 1-14

- Partial User, page 1-14

- Partner User, page 1-14

Refer to Appendix B for the technical names of these seeded user types together with their associated roles, responsibilities, and enrollments. See Other Users, page 1-14 for a discussion of Oracle iSupport users who are not registered or approved with the user management framework.

Primary User (Organization Contact)

Seeded as a user type in the JTT user management framework, the primary user is also known as the customer administrator. This user typically:

- Approves other users within his party/organization

- Assigns accounts to users (Party Accounts), that is, controls access to accounts

- Adds/modifies responsibilities to users within his party/organization

- Adds/modifies roles to users within his party/organization

The JTT user management framework supports any number of primary users for an organization.

The Oracle iSupport administrator for a merchant typically approves the initial primary user.

A primary user can approve the registration request submitted by another user as a primary user. This depends on the approval hierarchy defined for the user type/ enrollment.

Business User (Business to Business)

Seeded as a user type in the JTT user management framework, this user is a typical business-to-business user, associated with an organization other than the merchant utilizing Oracle iSupport.

Individual User (Business to Consumer)

Seeded as a user type in the JTT user management framework, this user type is an individual person with no relationship to an organization. Individual users generally self-register over the Internet. They are approved automatically by the application (unless this setting is changed by the administrator in the framework) and assigned the default role and responsibility that the administrator specifies for this user type during application setup configuration.

Partial User

A partial user is one who is an existing logged-in user who registers for access to applications without the need to create a new user account. This partial registration applies to both individual and business users.

Partner User

Partner User is for users who have already registered to be a partner. Through partial registration, they can request the iSupport roles and privileges so they can use the iSupport application.

Other Users

In addition to the seeded JTF User Types (Primary, Business, Individual), the merchant implementing Oracle iSupport receives a system administrator login/password and creates a user called the Oracle iSupport Administrator. In addition, he can choose to set up employee users, Oracle Knowledge Management administrator-users, survey administrators, and guest users. These users are discussed below.

- Oracle Applications System Administrator, page 1-14

- Oracle iSupport Administrator, page 1-15

- Employee User, page 1-15

- Knowledge Management Admin User, page 1-15

- Survey Administrator, page 1-16

- Guest User, page 1-16

Oracle Applications System Administrator

The System Administrator (SA) role is common to all Oracle Applications and comes

seeded with the applications. This is the highest-level user. This user comes with a sysadmin login and password (sysadmin/sysadmin). Oracle recommends that you change the password for this user at earliest convenience. For more information, see:

- *Oracle E-Business Suite Setup Guide*

- *Oracle E-Business Suite Concepts*

- *Oracle E-Business Suite CRM System Administrator's Guide*

Oracle iSupport Administrator

The merchant implementing Oracle iSupport uses the sysadmin login to set up the Oracle iSupport Administrator. This is a required user. The Oracle iSupport Administrator is a user chosen by the merchant to perform routine but high-level administrative tasks, such as:

- Setting up users and assigning appropriate roles and responsibilities

- Setting up the application home page

- Setting up Service Request

- Setting up the Products tab/Install Base

- Setting up Knowledge Management

- Setting up Accounts Management functionality

- Setting up Forums

- Setting up Web Call-Back

- Setting up Surveys

Instructions for setting up this user are in this guide.

Employee User

The Employee User is not seeded as a User Type in the JTT user management framework, but is supported by Oracle iSupport. The employee user is not seeded because the self registration functionality does not support the registration of employees belonging to the support organization. This type of user is an employee of the merchant using Oracle iSupport. This user is set up through the Forms interface by the Oracle iSupport Administrator. For information on setting up this type of user, see the Setting up iSupport Users topic in the Implementation Tasks chapter of this guide.

Knowledge Management Administrator-User

This is a user who performs Knowledge Management setup and management. This user

type is not seeded in the JTT user management framework. This user is required only if the merchant will use the Knowledge Management functionality. For more information, see the Integrating Oracle iSupport with Oracle Knowledge Management chapter of this guide.

Survey Administrator

This is a user who performs Surveys setup and management. This user type is not seeded in the JTT user management framework. This user is required only if the merchant will use Surveys. For more information, see the Configuring Surveys , page 9-23topic of this guide.

Guest User

A guest user is a user who comes to the Oracle iSupport site and does not already have an approved registration with iSupport. With the guest user facility, unregistered users can access certain features in Oracle iSupport. For example, a guest can access the self-service support web site and review solutions to problems in Oracle iSupport. The Oracle iSupport and Oracle iStore applications use the same guest user account to enable the guest user functionality.

Based on the roles and responsibility assigned to a guest user, the guest user can access the following features:

- View the home page for a guest user

- View technical library content accessible to a guest user

- Search, browse, and view solutions accessible to a guest user

Consistent with the single sign-on procedures for all Oracle applications, users log in, are checked for necessary privileges, and, as appropriate, may be invited to request partial registration through the Guest User page to gain access to protected pages of iSupport.

Authenticated Guest User

The application also supports the concept of an authenticated guest user. An authenticated guest user is essentially a user that has logged into the system but lacks iSupport permissions to view any iSupport protected page. If authenticated users without the proper iSupport permissions want to see the iSupport public or guest pages, they can do so as if they are a guest. The content of the pages are the same as those of a guest user. Only the menu is slightly different because such users are already logged in.

Enrollments

Enrollments are application-specific services at the user-type level. These services include the registration templates, page 1-17, roles, page 1-17, responsibilities, page 1-17, and approval definitions at the enrollment level. Oracle User Management provides

four types of enrollment available for a User Type:

- Automatic

- Self-service

- Delegation only

- Self-service and delegation

One enrollment corresponds to one or zero responsibility, one or zero template (see Templates, page 1-17), one or zero workflow, and zero or more roles.

For more information on enrollments, see the *Oracle E-Business Suite CRM System Administrator's Guide*.

Understanding Responsibilities

Oracle Application Foundation Responsibilities define application privileges. They control menu hierarchy available to a particular user. During the registration process, users are granted access to one or more responsibilities, depending upon the services/enrollments to which they subscribe and the merchant policy. Typically, individual consumers are given access to only one responsibility. With one responsibility, users do not need to know about the existence of responsibilities.

Responsibilities originally contained some security elements at the function level. Those turned out not to be sufficient for the CRM HTML applications, and now these security elements are included as roles/permissions infrastructure.

For more information, see the *Oracle E-Business Suite CRM System Administrator's Guide*.

Understanding Roles

A role is a collection of page- and function-level permissions. A permission is the smallest unit making up a role, and one or more permissions make up each role. Permissions dictate exactly which actions a user can perform. Users registering are assigned a default role or roles based on user type and enrollments. Additional roles can be assigned according to business needs.

For more information, see the *Oracle E-Business Suite CRM System Administrator's Guide*.

Modifying Seeded Enrollments

The seeded enrollments can be modified, and you can also create new enrollments. For more information, refer to the *Oracle E-Business Suite CRM System Administrator's Guide*.

Templates

Applications require different pieces of information to register various user types. Registration of a sales representative might require the sales territory, while a consumer registration would need to include the credit card number. Registration data is being stored in different tables - some is common data and is stored (mostly) in the Trading

Community Architecture (TCA); the rest is stored into application-specific tables.

Registration templates, which can be one JSP or multiple pages, accommodate these information-gathering requirements. The registration pages rendered to a user depend on the user type and the services/enrollments the user is subscribing to. Registration templates refer to JSP files that are used to capture the registration information that is particular to a user type.

Characteristics of registration templates include:

- JSPs associated to a template handler to execute the logic on data captured through JSP pages

- Can be tied to enrollments

- Are set up by the application administrator during implementation

- Can consist of one page or many pages

Defining New Registration Templates

New registration templates can be created using the System Administrator Console. For more information, refer to the *Oracle E-Business Suite CRM System Administrator's Guide* .

Approval Process

Approval is a step in the registration process whereby users and/or their enrollments are confirmed by an approving authority. After the approval process is completed, the system automatically grants the appropriate default role(s) and responsibility (based on User Type and/or Enrollments) that allow access to the application.

The approval process uses Oracle Workflow to track and route the request to each approver set up in the approval definition. The process informs the approvers of the request type (user type or enrollment) and what action is required.

Who Can Be an Approver?

Foundation approvers are application users who have one of the following permissions:

- JTF_REG_APPROVAL or JTF_SECURITY_ASSIGN_ROLE (System Administrator) permission.

- JTF_APPROVER (Request Owner) permission

- JTF_PRIMARY_USER_SUMMARY (Primary user) permission

The Primary User must also have the JTF_PRIMARY_USER responsibility to access the approval page.

Oracle iSupport user approvers are the Oracle iSupport Administrator and the Primary User(s). See the *Seed Data* appendix for their appropriate roles and permissions.

Defining a New Approval Process

New approval processes can be defined on the System Administrator Console. For more information, refer to the *Oracle E-Business Suite CRM System Administrator's Guide* .

Multi-Party Access

With the multi-party access feature, an iSupport B2B user can view and perform transactions for multiple parties using a single login id. The user can log in to the application and view or perform transactions for his default party, and then use the switch party mechanism to perform transactions for another party. The user must have access to the parties to be able to do the transactions.

Oracle iSupport Administrator and/or Primary User can grant access to multiple parties and the associated accounts to the business users. They can typically:

- Enable multi-party access

- Add, remove, enable, or disable access to a party

- Change the default party

- Add or remove party account access

- Enable service request search across multiple parties

Related Topics

Setting Up Multi-Party Access, page 3-27

Site Management

Merchants (Service organizations) have an option to leverage the multi site capabilities to provide targeted support to their users by defining and organizing their online support into multiple sites. This functionality in Oracle iSupport is provided by Oracle iStore multiple sites (Speciality Store/ Sites). It allows a seamless inter-navigation between Oracle iStore, Oracle iSupport, and Oracle Partners Online. The main features provided by Site Management Framework include:

- Multiple support sites using a single instance

- Improved navigation between iStore, iSupport, and Partners Online while maintaining context of the user, account, language, and site

- iSupport, iStore, and Partners Online functions in a single site

- Different branding for each site

- Single Sign On

- Improved self service registration, user profile, and user management

- Common, unified, and central site administration capabilities

Merchants (Service Organizations) who do not wish to use the multiple sites capabilities can implement Oracle iSupport in the conventional manner.

Oracle iSupport uses the Oracle iStore multiple site functionality, which includes the site definition, the site selection page, the dashboard, and the template manager for configuring the template pages.

Site functionality can be used only for guests and customers' users (users who are tied to a party) including customers' primary users when an organization is implementing sites.

Employee users use the Applications login to login into the application and use the mechanism of switching responsibility to access application under different responsibilities.

In the context of Oracle iStore, a site is any site that the site administrator (manager) creates using the Oracle iStore Site Administration UI. When you create a site in the Oracle iStore Site Administration UI, it is uniquely identified by a Site ID (also called Minisite ID).

Sections Overview

With the Oracle iStore section hierarchy, you can organize your sites into logical sections connected in parent-child relationships, and re-use these sections, their product associations, and their content in multiple sites.

The majority of section creation and maintenance tasks are performed using the Sections and Products pages, which are accessible as a user logs in with an Oracle iStore administrator responsibility.

In combination with the Display Templates, your site sections, connected in a hierarchal fashion, help determine the browsing path for the customer in your sites. All driven from the main Root section, together the sections, subsections, and products in your sites form a tree-like structure. After you create a section, you can use it in any number of sites. You also can choose to exclude certain sections from sites.

Using the site administration pages, you can:

- Create sections

- Duplicate existing sections, including all products and content

- Assign Display Templates to sections to determine the layout of the sections

- Assign products to sections -- either automatically or manually

- Assign or exclude sections to/from site(s)

- Preview sections in the context of the specialty site(s) in which they will appear

- Delete sections

- Rename sections

- Use the search utility to search for sections

Section Templates

Sections and their associated products appear in the Customer page in the context of the display templates in which they appear. In addition to the display templates, section appearance is affected by the structure of your section hierarchy, any section-product associations, and any content that you have associated with a section or product.

Template Manager

If you implement Oracle iStore with Oracle iSupport, then you can use the Oracle iStore template manager to configure Oracle iStore pages. With the template manager, you can link your own JSP files to seeded templates to present content that is not provided by the Oracle-supplied files. For example, the template manager enables you to create brandable registration pages and an overall common look and feel throughout your site. For details, refer to the *Oracle iStore Implementation and Administration Guide*.

Dashboard

A dashboard appears when a user selects a site - responsibility combination from the site selection page.This Site Dashboard allows service organizations to:

- Configure the layout of the dashboard and publish targeted content for users utilizing the template manager

- Publish bins that provide links to other applications based on a user's responsibilities and sites definition. For example, by using the Oracle iSupport related Bins on the site dashboard, users can navigate to Oracle iSupport to manage and create service requests.

- Publish application specific bins, for example, a bin to search the knowledge base and a bin to allow partner to enroll in targeted programs

- Support multi-language and globalization capabilities

Because the dashboard is integrated with Oracle Content Manager, it enables an administrator to show content from Oracle Content Manager on the dashboard.

The dashboard is a template page. It provides customers an ability to put their own content in their own style and present it to their customers. Several seeded bins are available on this page that an organization can use or it can define its own custom

content. The content on the dashboard can be configured using the template manager mapping between a template page, site, and language. This page is also integrated with content manager and can pull in content from the content manager.

Configurability

Oracle iSupport provides several ways to configure your site's appearance:

- Style sheet

  You can design and use different style sheets to control the display of HTML pages.

- Custom menu

  You can write a new menu renderer by implementing a JTT custom menu class and associating it with different Oracle iSupport responsibilities.

- Regions on a page and page flows

  For service requests, you can configure the content of page regions, the regions that pages display, and the pages that appear in the create-service-request flow.

- Page-level configurability

  You can configure the look and feel ofOracle iSupport JavaServer Pages (JSPs) for different users without customizing these pages directly. This is accomplished by putting customized material in the top, left, right, and bottom sections of the original content pages that Oracle supplies. Pages include those from the following areas:

  - Service request

  - Orders

  - Invoices

  - Payments

  - Shipments

  - Returns

- Language

  If you simply want to display the same information in a different language, then you can use JSP and AK regions or FND messages for translation. You can find steps to use AK regions and FND messages in documentation for Oracle self-service Web applications.

2

Dependencies and Integration Points

This chapter covers the following topics:

- Overview of Dependencies
- Mandatory Dependencies
- Software Installation
- Oracle Application Object Library
- Oracle CRM Technology Foundation
- Oracle Workflow
- Oracle Trading Community Architecture
- Oracle CRM Application Foundation
- Conditional Dependencies
- Oracle Web Conferencing
- Oracle TeleService
- Oracle Inventory and Oracle Install Base
- Oracle Enterprise Asset Management
- Oracle Bills of Materials
- Oracle Receivables
- Oracle General Ledger
- Oracle Human Resource Management System
- Oracle Order Management
- Oracle Quoting and Order Capture APIs
- Oracle Purchasing
- Oracle iStore
- Oracle Contracts Suite

- Oracle Customer Care

- Oracle Knowledge Management

- Oracle Marketing Encyclopedia System

- Web Call-Back Dependencies

- Oracle iMarketing

- Oracle Scripting

Overview of Dependencies

Because Oracle iSupport is integrated with multiple Oracle modules that supply varied data and functionality, merchants can choose which modules to implement based on their specific business requirements. These integrated modules present many dependencies to Oracle iSupport.

Dependencies are classified as either *mandatory*, meaning that Oracle iSupport cannot function without them, or *conditional*, meaning that they supply additional functionality, but are not required to run Oracle iSupport. The Mandatory and Conditional Dependencies sections in this chapter provide overviews of these dependencies.

For documentation and training related to these modules, see the Preface to this guide.

Mandatory Dependencies

Oracle iSupport relies on several Oracle E-Business Suite modules for its data and functionality. The modules that must be installed and set up for Oracle iSupport to function properly are discussed in the following paragraphs.

Software Installation

Your installation needs will vary depending upon whether you are doing a fresh installation (no previous Oracle applications installed), a multi-application upgrade using a Family Pack or Maintenance Pack, a multi-application upgrade involving several patches, or simply installing a single patch. In general, this documentation is written assuming that you are doing a fresh installation.

If you are installing Oracle Applications release 12 for the first time, or upgrading to release 12 from a previous release, use the appropriate version of Oracle Rapid Install as documented in:

- *Oracle E-Business Suite Installation Guide: Using Rapid Install*

- *Oracle E-Business Suite Upgrade Guide*

- Oracle E-Business Suite *Release Notes* for this release

Oracle Application Object Library

The Oracle Application Object Library is a required dependency of all Oracle applications. Supplying technology and common libraries for Oracle applications, Oracle Application Object Library allows user creation, responsibility creation and maintenance, and the assignment of responsibilities to users.

Oracle CRM Technology Foundation

Oracle CRM Technology Foundation (JTT) is a prerequisite for implementation of any Oracle CRM module. JTT provides Java-based infrastructure software that is used to develop e-business solutions such as Sales, Marketing, Service, E-Commerce, Contracts, and Interaction Center applications. It offers a common platform for developing applications with HTML, XML, and Java. It also provides user-friendly screens for centralized setup and administration. This web-based interface is called the System Administrator Console. For more information, see the *Oracle E-Business Suite CRM System Administrator's Guide*.

Oracle Workflow

In all Oracle applications, Oracle Workflow provides the ability to send e-mail notifications, and allows you to define various workflow processes required for normal business operations. Oracle Applications comes with Oracle Workflow (WF) already installed as part of the Applications Object Library. For details on how Oracle iSupport uses Oracle Workflow, please see the chapterIntegrating Oracle iSupport with Oracle Workflow, page 6-1.

Oracle Trading Community Architecture

The Oracle Trading Community Architecture consists of a database schema, APIs, and data quality management utilities that allow you to capture and exploit valuable information about your commercial community: organizations, people, places, and the network of relationships that bring them together. Oracle Trading Community Architecture is used by both Oracle ERP and Oracle CRM applications. For this release, Oracle's customer model is based on Oracle Trading Community Architecture.

Some APIs for Oracle Trading Community Architecture are published as part of this release. Refer to *Oracle Trading Community Architecture Technical Implementation Guide* for API details.

Oracle CRM Application Foundation

The CRM Application Foundation (JTA) consists of several supporting CRM applications. Some of those that Oracle iSupport requires are Assignment Manager, Notes, Resource Manager, and Territory Manager. For more information, see "Integrating Oracle iSupport with Service Request," *Oracle Trading Community Architecture Technical Implementation Guide,* and *Oracle Common Application Calendar Implementation Guide.*

Conditional Dependencies

Oracle iSupport relies on several other Oracle applications to extend its functionality. The applications that are conditional to Oracle iSupport are discussed in the following paragraphs.

Oracle Web Conferencing

Oracle Web Conferencing of the Oracle Collaboration Suite brings real-time online collaboration to any e-business, enabling employees, customers, and partners to conduct all types of conferences online in a common, flexible environment. Oracle iSupport requires this application if you want to enable contact center agents using Oracle TeleService to conduct a Web conference with customers using Oracle iSupport.

Oracle TeleService

A Forms-based product, Oracle TeleService contains the bulk of the service request functionality for Oracle iSupport. Integration with Oracle TeleService allows customers to use Oracle iSupport to submit, view, edit, and re-open their service requests online. In other words, Oracle iSupport makes it possible for customers and employees to log and monitor their service requests. Integration with Oracle TeleService also makes it possible for an agent to step in and help any customers who cannot resolve problems on their own. One way that an agent can do this is to initiate a Web conference that a customer attends within Oracle iSupport. Setup information is in the chapter Integrating Oracle iSupport with Service Request, page 4-2.

Oracle Inventory and Oracle Install Base

Oracle Inventory supplies the infrastructure that contains an organization's entire product repository and configuration. It integrates closely with Oracle Install Base, which is the repository of customer- or party-purchased products. Both Oracle Inventory and Install Base are required for full service request functionality in Oracle iSupport. Both applications also supply product information during retrieval of account information on the Oracle iSupport Account tab. Setup information is in the chapter

Integrating Oracle iSupport with Products and Returns, page 5-1.

Oracle Enterprise Asset Management

Agents and employee users can create service requests for work orders of internal assets tracked in Oracle Enterprise Asset Management. Enterprise Asset Management specializes in maintaining internal assets using a preventive maintenance schedule. More specifically, agents and employee users of Oracle iSupport have the following abilities regarding service requests for these assets:

- Creating

- Viewing

- Updating

- Searching

- Creating and saving a view that references an asset in Oracle Enterprise Asset Management

For setup details of integrating Oracle iSupport with Oracle Enterprise Asset Management, see Enabling Employees to File Service Requests for Assets, page 3-48.

Oracle Bills of Materials

Oracle Bills of Materials allows you to configure groups of products into coordinated and complementary systems. Oracle Bills of Materials allows the creation of products containing multiple components and subcomponents. It integrates with Oracle Inventory and Oracle Install Base. Setup information is in the chapter Integrating Oracle iSupport with Products and Returns, page 5-1.

Oracle Receivables

Oracle Receivables provides four integrated workbenches that you can use to perform most of your day–to–day Accounts Receivable operations. You can use the Receipts Workbench to perform most of your receipt–related tasks and the Transactions Workbench to process your invoices, debit memos, credit memos, on–account credits, chargebacks, and adjustments. The Collections Workbench lets you review customer accounts and perform collection activities such as recording customer calls and printing dunning letters. The Bills Receivable Workbench lets you create, update, remit, and manage your bills receivable. Refer to the volumes of the *Oracle Receivables User Guide* for setup information.

Oracle General Ledger

Oracle iSupport uses General Ledger to set up ledgers and books, store exchange rates, and store related business information. Refer to *Oracle General Ledger User Guide* for complete setup information.

Oracle Human Resource Management System

Oracle Human Resources Management System provides employee data for CRM and ERP applications. This application is mandatory only if a service organization wants its employees to log in and use Oracle iSupport as an online help desk.

Oracle Order Management

Oracle Order Management processes orders booked in Oracle Quoting, Oracle iStore, and Oracle Order Management itself. Oracle Order Management and Oracle Quoting are both integral applications for returns functionality in Oracle iSupport. Oracle Order Management integrates with Oracle Advanced Pricing for determining prices of goods sold and Oracle Shipping for shipping execution. Oracle Order Management uses Oracle Receivables for keeping records of customers and invoices, and capturing payments. Oracle Order Management also depends on Oracle General Ledger. Setup information is in the chapter Integrating Oracle iSupport with Products and Returns, page 5-1.

Oracle Quoting and Order Capture APIs

Orders quoted in Oracle Quoting are sent to Oracle Order Management for processing. These orders then can be viewed within the Oracle iSupport Account tab. There are three parts to quoting: Oracle Quoting for forms, Oracle Quoting for HTML, and Oracle Order Capture APIs. All of these coordinate in the returns process, and Oracle Order Capture APIs are essential to returns functionality in Oracle iSupport. Setup information is in the chapter, Integrating Oracle iSupport with Products and Returns, page 5-1.

Oracle Purchasing

The Receipts form of Oracle Purchasing receives returns created in Oracle iSupport. Setup information is in the chapter, Integrating Oracle iSupport with Products and Returns, page 5-1.

Oracle iStore

With the Oracle iStore application, merchants can set up Internet storefronts that

capture and process customer orders. Orders placed in Oracle iStore can be viewed within the Oracle iSupport Account tab. Oracle iStore and Oracle iSupport leverage the same pages for displaying information about orders, invoices, payments, shipments, returns, and for creating returns. For implementation with sites, Oracle iSupport uses the common site framework of Oracle iStore as defined in the *Oracle iStore Implementation and Administration Guide*. This framework comprises the following elements:

- Login

- Logout

- Registration

- Site Definition

- Section Hierarchy

- Section Layout

- Template Manager

- Site Dashboard Bins

- Profile Management

- User Management

- Returns Creation

- Pages such as Orders, Invoices, Payments, Shipments, and Returns

Setup information for sites is contained within the *Oracle iStore Implementation and Administration Guide*.

For implementation without sites, by default, all order tracker menus in the following Oracle iSupport responsibilities that have access to the Account menu tab are disabled:

- IBU_BUSINESS_USER_RESP (Oracle iSupport Business User)

- IBU_INDIVIDUAL_USER_RESP (Oracle iSupport Individual User)

- IBU_PRIMARY_USER_RESP (Oracle iSupport Primary User)

To enable Order tracker pages in these responsibilities:

Log into Oracle Forms with the sysadmin responsibility.

1. Query up one of the responsibilities listed above.

2. Remove the following entries in the Menu Exclusion section:

- IBU_INQ_ORDERS

- IBU_INQ_INVOICES

- IBU_INQ_PAYMENTS

- IBU_INQ_RMAS

Oracle Contracts Suite

Oracle Contracts Suite - made up of Oracle Contracts Core and Oracle Service Contracts - provides a complete range of contracts creation, service, organization, and termination. Oracle iSupport relies on the Contracts Suite to provide data about customer entitlements, service contracts, warranties, extended warranties, and response commitments. This data is retrieved by Oracle iSupport when customers view account information. See Oracle Contracts documentation for setup information.

Oracle Contracts Core

Oracle Contracts Core is both an application that provides supporting master agreements and a foundation for all other Oracle Contracts modules. The generic functionality required by all types of contracts is contained in the Oracle Contracts Core foundation layer, such as contract access control, renewal, termination, and notification management.

Oracle Service Contracts

Oracle Service Contracts creates and manages service contracts, warranties and extended warranties; provides visibility to contract entitlements; and acts upon contractual commitments within the contract. Oracle Service Contracts builds upon the foundation of Oracle Contracts Core and adds functionality to meet the specific needs of the service industry, such as coverage terms and entitlement checking.

Oracle Customer Care

The Oracle Customer Care part of Oracle TeleService is composed of four modules:

- Contact Center

- Relationship Plans

- Customer Profile/Dashboard

- Critical Customer Management

These modules allow customer support agents to manage many aspects of support, including real-time interactions, information retrieval, customer creation, historical views, service request creation, knowledge base data retrieval, product management, and relationship plans. When a customer requests a call back, the application, at the time of a call back, provides the agent information about the customer using the contact center

Oracle Customer Care integrates with several ERP and CRM modules to support and extend its functionality. Setup information can be found in the *Oracle TeleService Implementation and User Guide*.

Oracle Knowledge Management

In Oracle iSupport, Oracle Knowledge Management provides knowledge base searches during service request creation, the display of frequently used solutions on the home page, and knowledge base searches from the Support tab. With the optional installation of Oracle Enterprise Search, Knowledge Management also provides searches through unstructured files and Web pages. Knowledge Management Setup information is in the *Oracle Knowledge Management Implementation and Administration Guide.*

Oracle Marketing Encyclopedia System

In Oracle iSupport, Oracle Marketing Encyclopedia System provides functionality for publishing information to the home page Alerts bin, displaying other optional home page content, and searching and browsing the technical library. See chapter 9 for setup information.

Web Call-Back Dependencies

The Web Call-Back (Call Me) feature allows users to submit a call-back request through the Oracle iSupport user interface. The web call-back requires implementation of the Oracle Interaction Center suite of applications and the purchase of call center hardware. It also requires the implementation of Oracle Universal Work Queue, Oracle Customer Care, and Oracle CRM Foundation Notes module. For further information, see the Setting up iSupport Web Call-Back, page 3-49 in the Implementation Tasks chapter.

Oracle iMarketing

The eMerchandizing feature of Oracle iMarketing provides the ability for a service organization to show dynamically different campaign messages defined in an Oracle application to the customer users of their various support sites. Oracle iSupport supports both the classic and the newer lite version of eMerchandizing. The setups for the Oracle iMarketing classic and lite versions are different. Refer to the *Oracle Marketing Implementation Guide* for details. For Oracle iSupport setup steps to achieve integration with iMarketing, see Setting Up Integration with Oracle iMarketing, page 3-

.

Oracle Scripting

Oracle iSupport uses Oracle Scripting to provide Surveys functionality. Oracle Scripting also presents scripts to the desktop of an Interaction Center agent to aid customer service. For further information, see the Setting Up Oracle iSupport Surveys topic, page 3-43, in the Implementation Tasks chapter.

3

Implementation Tasks for Oracle iSupport

This chapter covers the following topics:

- Overview of Implementation Tasks
- Confirming General Oracle Applications Setups
- Confirming Oracle Trading Community Architecture Setup
- Confirming Oracle Receivables Setup
- Defining Employees
- Confirming Oracle Foundation Technology Stack Setup
- Performing System Administration Setups
- Confirm Menus/Functions Setup
- Understanding Responsibilities and Roles
- Set Up Profile Options
- Set Up Properties
- Setting Up Oracle Workflow
- Setting Up CRM Foundation
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- Setting Up Registration Templates
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- Setting Up Oracle iSupport Users
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- Steps to Assign Additional Roles and Responsibilities
- Setting Up Language Associations
- Setting Up an Oracle iSupport Primary User

- Setting Up Employee User

- Setting Up Business (B2B) User

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- Setting Up Knowledge Management Administrator-User

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- Setting Up Guest User

- Setting Up Multi-Party Access

- Setting Up Sites

- Setting Up Oracle iSupport Homepage

- Designing the Mandatory Content of the Home Page

- Designing the Default Content of the Home Page

- Editing Content Properties

- Adding Content to the Home Page

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- Deleting Content from the Home Page

- Enabling Homepage Subscription E-Mails

- Setting Up Service Request

- Setting Up Oracle Knowledge Management

- Setting Up Oracle iSupport Forums

- Creating Categories

- Creating Forums

- Restricting Access to Categories or Forums

- Creating Forum Moderators

- Deleting Forum Moderators

- Setting Up Marketing Encyclopedia System

- Setting Up Account Inquiries

- Setting Up Oracle iSupport Surveys

- Setting Up Oracle Scripting

- Create Surveys in Oracle Scripting

- Assign Survey Administrator Responsibility to an Oracle iSupport User

- Set Up Oracle iSupport Survey in iSurvey

- Make Survey Available in Oracle iSupport

- View Survey Results

- Enabling Employees to File Service Requests for Assets

- Setting Up Integration with iMarketing

- Setting Up Oracle iSupport Web Call-Back

- Setting Up Customer Care

- Setting Up Page-Level Look and Feel

- General Steps to Perform JSP Configuration

- Mapping Customized JSPs to Customizing Functions

- Mapping Page-Level Configuration Functions to Responsibilities

- Setting Up Custom Menus

Overview of Implementation Tasks

Oracle iSupport relies on other Oracle applications for its functionality. In order to successfully implement Oracle iSupport, you must set up its mandatory dependencies, and optionally, its conditional dependencies.

The tasks described in this guide assist your setup of Oracle iSupport, Release 12. Many companies installing Oracle iSupport already are running some of the mandatory and/or conditional Oracle applications. For them, Oracle iSupport is an add-on or upgrade. Thus, depending upon your particular situation, you may or may not need to perform all of the tasks listed here.

Confirming General Oracle Applications Setups

Your setup steps for Oracle iSupport depend upon whether you are creating a fresh install of Oracle Applications or upgrading to the current release from a previous release. The steps in this section are confirming setups of applications that all Oracle applications depend upon. For details, refer to *Oracle E-Business Suite Installation Guide*, *Oracle E-Business Suite Upgrade Guide*, and *Oracle E-Business Suite Setup Guide*.

Confirming Oracle Trading Community Architecture Setup

Ensure the setup of the following in the model for the Oracle Trading Community Architecture:

- Parties

- Party Relationships

- Locations

- Contact Points

- Customer Attributes

Refer to current Trading Community Model documentation for additional details.

Confirming Oracle Receivables Setup

Confirm the setup of Oracle Receivables.

Refer to the *Oracle Receivables Implementation Guide*.

Defining Employees

Define or confirm the definitions of your employees in Oracle Human Resources Management System (HRMS) or another HR application.

For Oracle Human Resources Management System documentation, refer to Oracle HRMS guides.

Confirming Oracle Foundation Technology Stack Setup

Confirm the setup of the technology stack. Refer to any Oracle Foundation Technology Stack documentation that is available on My Oracle Support.

Performing System Administration Setups

The merchant implementing Oracle iSupport receives a system administrator login and uses that login in the setup of the application. The system administrator username and password that are seeded are: sysadmin/sysadmin. It is recommended that you change this password to something unique.

Some of the setups listed here are optional. Refer to the text for details.

Confirm Menus/Functions Setup

The menus on the Oracle iSupport HTML UI are seeded in Oracle Application Object Library (AOL). They are linked to the seeded Functions in AOL. It is optional to confirm the setup of menus and functions.

You can define your own menus and responsibilities. For a list of seeded menus and functions in Oracle iSupport, see the Seeded Data appendix.

Confirm Functions

Functions link to coding within specific JSPs and to application menus. Those necessary

for Oracle iSupport are seeded in AOL. To view Functions in AOL, log into Oracle Applications as sysadmin and navigate to System Administrator > Application > Function. From there, query for function names that begin with `IBU_`.

Confirm iSupport Menus

Each menu in Oracle iSupport links to a function or another menu. Confirming menus is not mandatory. To view menus in AOL, log into Oracle Applications as sysadmin and navigate to System Administrator > Application > Menus. From there, query for menu names that begin with `IBU_`.

For additional information, see the *Oracle E-Business Suite Setup Guide*.

Understanding Responsibilities and Roles

Responsibilities are defined for application security and determine which menus a user will see. Roles are collections of permissions which allow users to perform various functions. Roles and responsibilities must be assigned to users to be effective.

If you are using the CRM User Management Framework for user setup, responsibilities and roles are seeded within each User Type. As each user is approved, the roles and responsibilities that are assigned depend upon your setup of the user framework. Refer to the *Oracle E-Business Suite CRM System Administrator's Guide* for more information on what is seeded by user type, and how to customize user types.

The Oracle iSupport module has its own seeded responsibilities and roles that you can use. Setup steps for creating users are in the Setting Up Oracle iSupport Users section, page 3-12. Refer to the Seeded Data appendix for Oracle iSupport roles and responsibilities that ship with the application.

Refer to AOL documentation for information on how to set up new responsibilities, roles, and permissions, or to customize existing ones.

Set Up Profile Options

Profile options are seeded within all Oracle applications, and each module has its own specific set of profile options. Although all profile options are seeded, there are some settings that must be performed by sysadmin. See the Profile Options appendix for details.

Set Up Properties

There are two sets of key components for Oracle iSupport that must be set. These are:

- Company key components

  This information is used for constructing the e-mail body for notifications that are sent out as part of the home page e-mail subscription functionality.

- Quick Find window key components

  You can enable or disable the searches in Quick Find based on responsibility.

Steps

1. Log in to Oracle Applications as sysadmin/sysadmin.

2. Navigate to Settings > System > Advanced. Select Oracle iSupport's product code, IBU, from the View LOV.

3. Set the following company key components to appropriate values. These properties are used while sending out Home Page subscription e-mails:

   - COMPANY_ADDRESS

   - COMPANY_EMAIL ADDRESS

   - COMPANY MERCHANT_NAME

   - COMPANY_NAME

   - COMPANY_URL

4. To confirm the setup of the Quick Find window items, verify that the following values are set for search.factories by clicking search.factories:

   - oracle.apps.ibu.requests.bean.RequestSearchFactory

   - oracle.apps.ibu.knowledge.bean.TechLibSearchFactory

   - oracle.apps.ibu.communities.bean.MyForumSearchFactory

   - oracle.apps.csi.qk.CsiqkInstanceFactory

   - oracle.apps.cs.knowledge.bean.SolutionSearchFactory

   - oracle.apps.cs.knowledge.bean.SolutionCategorySearchFactory

5. Next, verify that the Quick Find window key components are set according to what your business processes require. Remove any items that you do not wish to use

   - When deleting items, be sure to remove the pairs of items that end in .categories and .desc.

     Here is an example of what the seeded components will be:

     Oracle Install Base*:

- service.oracle.apps.cs.inquiries.bean.IBSearchFactory.categories

  The value of this component is Install Base.

- service.oracle.apps.cs.inquiries.bean.IBSearchFactory.desc

  The value of this component is IBSearch.item.

  Forums:

- service.oracle.apps.ibu.communities.bean.MyForumSearchFactory.categories

  The value of this component is Forums.

- service.oracle.apps.ibu.communities.bean.MyForumSearchFactory.desc

  The value of this component is MyForumSearch.item.

  Oracle Knowledge Management:

- service.oracle.apps.ibu.knowledge.bean.SMSSearchFactory.categories

  The value of this component is Solutions.

- service.oracle.apps.ibu.knowledge.bean.SMSSearchFactory.desc

  The value of this component is SMSSearch.item.

  Marketing Encyclopedia System (MES):

- service.oracle.apps.ibu.knowledge.bean.TechLibSearchFactory.categories

  The value of this component is Library.

- service.oracle.apps.ibu.knowledge.bean.TechLibSearchFactory.desc

  The value of this component is TechLibSearch.item.

  Service Request:

- service.oracle.apps.ibu.knowledge.bean.RequestSearchFactory.categories

  The value of this component is Service Requests;

- service.oracle.apps.ibu.knowledge.bean.RequestSearchFactory.desc

  The value of this component is RequestSearch.item.

6. For any responsibility, set this up manually:

   ui.nav.logout.disabled.resp.<responsibility key> = true.

   > **Note:** *By default, the responsibility iSupport: iSupport Self-Service Helpdesk does not contain the Install Base category under the Quick

Find window. You must set this up manually because it cannot be shipped out of the box. To do so, create a JTT property called search.factories.<respid of isupport self-service helpdesk responsibility> and then add the categories that you want exposed to this responsibility.

Setting Up Oracle Workflow

See the chapter in this guide Integrating Oracle iSupport with Oracle Workflow, page 6-1, or refer to *Oracle Workflow Administrator's Guide*.

Setting Up CRM Foundation

Set up and/or confirm the setup of the CRM Foundation software suite. Oracle iSupport service request functionality uses the Notes, Resources, and Assignment Manager modules. Oracle Knowledge Management functionality also uses Notes and Resources. Thus, at a minimum, you should be familiar with the setup and functionality of Notes, Resources, and Assignment Manager. For information on the Oracle iSupport-specific setups related to these modules, see these sections:

- Setting Up Oracle Knowledge Management

- Integrating Oracle iSupport with Service Request

Refer to *Oracle E-Business Suite CRM System Administrator's Guide, Oracle Common Application Calendar Implementation Guide*, and *Oracle Trading Community Architecture Technical Implementation Guide* for details.

Setting Up CRM User Management Framework

The Oracle CRM User Management Framework consists of enrollments, approval processes, registration templates, and user types. These components provide a flexible framework for user creation, approval, management, and information gathering.

The user management framework is an optional but recommended integration for your organization. Although the framework is installed automatically when you install CRM Foundation modules, you need to perform some setups.

The information in this section is meant to give you an overview of the user management framework concepts. For more information, refer to the *Oracle E-Business Suite CRM System Administrator's Guide*.

Setting Up Enrollments

Enrollments are application-specific services at the user level. These services include the

registration templates, page 1-17, roles,, page 1-17 responsibilities, page 1-17, and approval definitions that are tied to user types. Oracle User Management provides four types of enrollment available for a user type:

- Automatic

- Self-service

- Delegation only

- Self-service and delegation

One enrollment can equal:

- 0 or 1 responsibility - You can link no more than one responsibility to an enrollment.

- 0 or 1 template - You can link no more than one registration template to an enrollment.

- 0 or 1 workflow - You can link no more than one workflow process to an enrollment.

- 0 or more roles - You can link any number of roles to an enrollment.

For more information on enrollments, see the *Oracle E-Business Suite CRM System Administrator's Guide.*

Sample Registration/Enrollments Scenario for a Business User

User A accesses the HTML login page and begins self-registration. The first registration page that he sees is a list of user types (such as Primary User, Business User, Individual User). User A selects Business User as his user type. The user type selection determines which implicit enrollments (default role and responsibility tied to his user type) he will get from the JTT user management framework.

During implementation or setup, the application administrator (sysadmin) must configure User Types and implicit enrollments on the System Administrator Console. The administrator may also set up enrollments to which users can subscribe.

Continuing with registration, User A enters his customer number (provided by his application administrator), his name, address information, and so on. He chooses a unique username and password.

In the next page, User A is presented with a list of enrollments, such as Self-Service Support Over the Web (for Oracle iSupport), and Oracle iStore. These are explicit enrollments. He can select none, one, or all listed enrollments. If User A selects no enrollments, he receives only the implicit enrollments (the default role and responsibility) tied to the Business User Type. Other roles and responsibilities can be manually added later to his username by the Oracle iSupport Administrator.

The registration request enters the approval process. The JTT user management framework comes with seeded approval processes that leverage Oracle Workflow for e-mail notifications. If User A logs in to the application before he is approved, then he sees a page that tells him that his approval is pending.

After User A is approved, he receives an e-mail notifying him of his approval, and then he can log in to the HTML login page. His application landing page depends upon the default responsibility assigned to him when he logs in.

Seeded Self-Service Support Over the Web Enrollment

The enrollment tied to Oracle iSupport is called the Self-Service Support Over the Web Enrollment. It is seeded within the CRM User Management Framework.

An appendix table, page C-10 shows seeded Oracle iSupport user responsibilities for Self-Service Support Over the Web Enrollment. Responsibilities that contain the word "site" in their titles are used in cases where a user registers using the Oracle iStore registration page.

The section Oracle iSupport Enrollments, page C-14 lists the responsibilities, roles, and other information for seeded Oracle iSupport enrollments for Self-Service Support Over the Web Enrollment.

Modifying Seeded Enrollments

The seeded enrollments can be modified, and you can also create new enrollments. For more information, refer to the *Oracle E-Business Suite CRM System Administrator's Guide* .

Setting Up Registration Templates

Applications require different pieces of information to register various user types. Registration of a sales representative might require the sales territory, while a consumer registration would need to include the credit card number. Registration data is being stored in different tables - some is common data and is stored (mostly) in the Trading Community Architecture (TCA); the rest is stored into application-specific tables.

Registration templates, which can be one JSP or multiple pages, accommodate these information-gathering requirements. The registration pages rendered to a user will depend on the user type and the services/enrollments the user is subscribing to. Registration templates refer to JSP files that are used to capture the registration information that is particular to a User Type.

Characteristics of registration templates include:

• JSPs associated with a template handler to execute the logic on data captured through JSP pages

• Can be tied to enrollments

- Are set up by the application administrator during implementation

- Can consist of one page or many

Defining New Registration Templates

New registration templates can be created using the JTF sysadmin console. For more information, refer to the *Oracle E-Business Suite CRM System Administrator's Guide*.

Setting Up Approval Processes

Approval is a step in the registration process whereby users and/or their enrollments are confirmed by an approving authority. After the approval process is completed, the system automatically grants the appropriate default role(s) and responsibility (based on User Type and/or Enrollments) that allow access to the application.

The approval process uses Oracle Workflow to track and route the request (via an e-mail message) to each approver set up in the approval definition. The e-mail informs the approvers of the request type (user type or enrollment) and what action is required.

Seeded JTF Approval Processes

User Type seeded approval processes are:

- **Individual User** - No approval required

- **Business User** - Approval notification sent to Primary User(s)

- **Primary User** - Approval notification sent to Oracle iSupport Administrator, or System Administrator

Who Can Be an Approver?

- **Request Owner** - This user is the current approver based on the approver list and current state of workflow defined for given approval. The Request Owner will only be able to approve the requests that are owned by him. This user should have JTF_APPROVER permission.

- **Oracle Applications System Administrator** (sysadmin) - The sysadmin will see and be able to approve all pending requests. Users who have the JTF_REG_APPROVAL permission are considered sysadmins. The Oracle iSupport Administrator role (IBU_SYSTEM_ADMIN) has the JTF_REG_APPROVAL permission.

- **Oracle iSupport Administrator** - The Oracle iSupport Administrator sees a list of pending approvals. Users who have the IBU_SYSTEM_ADMIN role are considered to be the Oracle iSupport Administrator.

For primary users to see the list of pending approvals in their company, the administrator must do the following setup:

1. Create a dummy user JTA_DUMMY through the fnd_user window.

2. Assign CRM_PRIMARY_USER responsibility to this user.

3. Assign the JTF_APPROVER role to this user.

4. Set this user to be the value of the JTF_PRIMARY_USER profile option.

- **Primary User** - This user can view and approve the requests that are assigned to the Primary User role, as well as the requests owned by the Primary User. The requests assigned to the Primary User role are filtered based on the current approver's organization. Primary Users need the JTF_PRIMARY_USER_SUMMARY role to view the pending requests page showing their list of users waiting approval. Requests assigned to the Primary User role are identified by the JTF_PRIMARY_USER profile option, which should be set to a predetermined username or an FND dummy user. The name used for the Primary User Role needs to be in the approval hierarchy if the primary user is needed for approval.

  For a primary user to see the list of pending approvals in his company, the administrator must do the setup described under the section about the Oracle iSupport Administrator.

  A primary user does not see any listing on the pending approvals page unless his turn in the approval process. For example, if the approval chain is A, B, C, where C is the JTA_DUMMY, then only after A and B has approved the user will the primary user see this in his pending approval window.

Defining a New Approval Process

New approval processes can be defined on the JTF sysadmin console. For more information, refer to the *Oracle E-Business Suite CRM System Administrator's Guide*.

Setting Up Oracle iSupport Users

Oracle iSupport uses the Oracle CRM User Management Framework. Because Oracle iSupport also has its own user responsibilities and roles, this section contains information on setting up Oracle iSupport users exclusive of the new framework. See Setting up Oracle CRM User Management Framework, page 3-8 for more information on its functionality.

Setting Up Oracle iSupport Administrator

The merchant implementing Oracle iSupport uses the sysadmin login to set up the Oracle iSupport Administrator. This is a required user and is not one of the seeded user

types within the CRM User Management Framework.

The Oracle iSupport Administrator responsibility, iSupport System Administrator, is seeded in AOL. This responsibility has the responsibility key IBU_SYS_ADMIN.

The menu assigned to this responsibility is called iSupport Administration Root (IBU_SYS_ADMIN_TOP_MENU). See *Oracle E-Business Suite Setup Guide* for more information on building menus and creating responsibilities.

The Oracle iSupport Administrator typically performs routine but high-level administrative tasks, such as:

- Setting up users and assigning appropriate roles and responsibilities

- Setting up the application homepage

- Setting up optional service request functionality

- Setting up optional products and returns modules

- Setting up optional knowledge management modules

- Setting up optional accounts functionality

- Setting up iSupport forums

- Setting up iSupport Call Me (web call-back)

- Setting up iSupport Surveys/Feedback feature

Oracle iSupport Administrator functions are accessible by using the Oracle iSupport Administrator username and password on the Applications login page, and then selecting the Administration button in the top-right of the window.

Steps to Set Up Oracle iSupport Administrator

Follow the steps below to set up the Oracle iSupport Administrator.

Prerequisite:

Employees have been defined using Oracle Human Resources Management System or another human resources application. For Oracle HRMS documentation, refer to the *Oracle HRMS Enterprise and Workforce Management Guide*.

Associate User Name with Employee and Assign Responsibility

1. Log in to the Oracle Forms application as sysadmin. Select System Administrator responsibility. Navigate to Security > User > Define. The Users window opens.

2. In the Users window, enter the username for the Oracle iSupport Administrator. An

example is IBUADMIN. (IBU is the product code for Oracle iSupport.)

3. Associate the user with an employee by using the Person LOV in the User Form. Select the desired association by double-clicking on the employee name.

4. Tab to Password field and enter a password. Tab to clear the field and re-enter the same password to validate.

5. In the Responsibilities tab, select the IBU_SYS_ADMINresponsibility.

6. Save changes.

7. Still using System Administrator responsibility, navigate to Profile > System.

8. Query with the username in the username field and `JTF%DEF%` in the Profile field.

9. Set the following profile option at the user level for the administrator:

   • JTF_PROFILE_DEFAULT_APPLICATION - 672

     This tells the system that the default application for this user is Oracle iSupport, whose application ID is 672.

10. Find the responsibility ID for the IBU_SYS_ADMIN responsibility (see steps below) and enter that value as the JTF_PROFILE_DEFAULT_RESPONSIBILITY value. Set at user level.

    This tells the system that the default responsibility for this user is IBU_SYS_ADMIN.

11. Save and close the window.

Finding Responsibility ID

Use the following steps to find theRESPONSIBILITY_ID value of a responsibility. See the *Profile Options* appendix for details on determining APPLICATION_ID values -- The application ID is used when setting system profile values.

1. In Oracle Forms as System Administrator, navigate to Security > Responsibility > Define. The Responsibilities window opens.

2. From the top menu, select View > Find. Search for the IBU_SYS_ADMIN responsibility. After this is found, highlight the responsibility, and select Ok in the search window. The Responsibilities window is populated with the information for the responsibility.

3. With the cursor in any field of the record, select Help > Diagnostics > Examine. The Examine Field and Variable Values window opens.

4. In the Examine Field and Variable Values window, select RESPONSIBILITY_ID from the Field LOV. The Value field displays the value of RESPONSIBILITY_ID.

Assign Role(s)

1. Navigate to Users > Registration > User Maintenance.

2. Find the user who will be the Oracle iSupport Administrator. Select the underlined hyperlink of the username.

3. Select Roles. Assign IBU_SYSTEM_ADMIN and IBU_REG_USER to the user.

4. Select Update.

5. Log out.

Verification

1. Log in to the Applications login as the Oracle iSupport Administrator just created.

2. Verify that appropriate menus are displayed. The Oracle iSupport Administrator has the following main tabs on the UI:

   - Home

   - Support (subtabs: Top Solutions, Technical Library, Forum, Service Requests)

3. Under Profile, the Oracle iSupport Administrator has access to the following links:

   - Personal Profile

   - Contact Points

   - Addresses

   - Display Preferences

   - Accounts

   - Support

   - My Enrollments

   - A section for Company Information.

4. Select the Administration button at the top of the window. Verify that the Oracle iSupport Administrator can access the following administrator tabs:

   - User (subtabs: User, Pending Approvals)

- Homepage (subtabs: Content, Subscription)

- Support (subtabs: Request template, Call Me, Survey, Technical Library, User Group, Supported Languages)

- Forum (subtabs: Category, Forum, Messages, User Group)

- MES

Steps to Assign Additional Roles and Responsibilities

After you have set up the Oracle iSupport Administrator, you can use that user to assign additional responsibilities and/or roles to users.

Remember, as a CRM User Management Framework User Type is approved, the system automatically gives those users a default role(s) and a default responsibility. Which roles and responsibilities are granted depends upon how you have configured the user management framework, including what roles and responsibilities are linked to the User Type and Enrollment selected during registration.

If you are creating custom users or if you need to assign additional responsibilities or roles to users, then use the following steps:

1. Log into Oracle iSupport as the Oracle iSupport Administrator.

2. Navigate to Administration > User.

3. Search for the user whom you wish to modify.

4. Select the underlined link of the username.

5. In the Personal Profile window, select either Roles or Responsibilities as appropriate.

6. Assign the roles/responsibilities as desired.*If you assign additional responsibilities, then be sure to select a default responsibility*.

> **Note:** The default responsibility that is active at the time a user logs in to the Applications login determines which application he initially accesses. The user can change this default by accessing the Profile > Preferences menu in Oracle iSupport.

Setting Up Language Associations

Use this procedure to associate an installed application language with a responsibility.

Steps

1. Log into Oracle iSupport as the Oracle iSupport Administrator.

2. Navigate to Administration > Support > Supported Languages.

3. Select a responsibility from the Select Responsibility LOV, and click GO. A list of candidate languages appears.

4. In the Enable As a Supported Language column, select the check box for languages that you want to associate with the responsibility. Clear a check box to remove the association.

5. Use the Restore button as needed return the selections to the state that they were just after the last update. Then continue you selection and deselection.

6. Click Update. A confirmation message appears to say that your selection has been saved.

Setting Up an Oracle iSupport Primary User

The Oracle iSupport Primary User typically:

- Approves other users within his party/organization

- Adds/modifies responsibilities to users within his party/organization

- Adds/modifies roles to users within his party/organization

The primary user can be approved by another primary user with the same responsibility as that of an Oracle iSupport Primary User for the party (organization) to which the primary user belongs, or by the Oracle iSupport Administrator.

Steps to Set Up an Oracle iSupport Primary User

Follow the steps below to set up the Oracle iSupport Primary User.

Registration

1. Select the Register link on the Applications login. Or, have the user self-register using the Register link.

   Note: If you have already set up this user through the Oracle Forms interface, Oracle Human Resources Management System (HRMS), or your company's own HR application, then you may skip the Registration step. Instead, associate an employee with a user name in the Forms application (as you did with the administrator-user), and assign the iSupport Primary User responsibility there. This has the responsibility key IBU_PRIMARY_USER_RESP.

2. If you are registering your company for the first time, select Register your company link.

3. Enter the company information in the Business Information section. Enter information about the primary user in the Personal Information section. Make a note of the user name and password.

4. In the Available Enrollments table, select the Self-Service Support Over the Web option.

   Note: The Enrollments window brings in the CRM User Management Framework. The default roles and responsibilities linked to the Self-Service Support Over the Web enrollment will be assigned to this user upon approval. See the topic, Seeded Self-Service Support Over the Web Enrollment, page 3-10, for default roles and responsibilities that are seeded by user type for this enrollment.

5. Click Submit.

If the company is already registered, select Register as a user of an existing company link. Enter the registry ID and information about the primary user. Select Self-Service Support Over the Web and click Submit.

Approval

1. Log in to the Applications login page as sysadmin.

   Note: It is possible to set up a user other than sysadmin to be the approver. For more information, refer to the *Oracle E-Business Suite CRM System Administrator's Guide*. Depending on setup, you may be asked to pick a responsibility before you can proceed. Choose the CRM HTML Administrator responsibility.

2. Navigate to Users > Registration > Pending Approvals.

3. In the Request Summary window, select the appropriate underlined username.

4. Fill in the mandatory information. Select Next.

5. Select the Accounts button. Choose the company account(s) to associate with the user. Select Next.

6. Enter any comments in the Comments area. Select Accept.

Verification

1. At the Applications login page, log in as the Primary User just created.

2. Verify that appropriate menus are displayed. The Primary User has access to the following main tabs on the UI:

   • Home

- Account (subtabs: Orders, Invoices, Payments, Contracts, Returns, Products, Repair Orders)

- Support (subtabs: Top Solutions, Technical Library, Service Requests)

3. Under the Profile button, the Primary User has access to the following links:

   User Profile:

   - Personal Profile

   - Contact Points

   - Addresses

   - Display Preferences

   - Accounts

   - Support

   - My Enrollments

     Company Profile:

   - Information

   - Contact Points

   - Addresses

   - Administrators

4. Select the Administration button at the top of the window. Verify that the Primary User can access the following administrator tabs:

   - User

   - Pending Approvals

   - Party Access

Setting Up Employee User

This type of user is an employee of the merchant using Oracle iSupport. This user is set up through the Forms interface and approved by the Oracle iSupport Administrator or the Primary User for the Employee User's organization.

Steps to Set Up Employee User

Follow the steps below to set up this user.

Prerequisite:

Employees have been defined using Oracle Human Resources Management System or another HR application. For Oracle HRMS documentation, refer to the *Oracle HRMS Enterprise and Workforce Management Guide*.

Steps

1. Log into Oracle Forms application as sysadmin. Select System Administrator responsibility.

2. Navigate to Security > User > Define. The Users window appears.

3. Enter a Username for the user. For example, you could use the first initial and last name of the employee.

4. On the User window, associate the new username with an employee: Click in the Person field on the User window. Search for the employee by clicking on the LOV field {...}, entering a partial value and clicking Find. Select the employee by double-clicking the employee name.

5. In the Password field, enter a password for the username. Use the Tab key to clear the Password field, and then re-enter the password to validate.

6. If desired, limit the number of days this password will be valid by entering a value in days in either the Accesses or Days fields. The user will be prompted to change this password after x number of days/accesses, where x represents the value that you entered in the Days field or Accesses field. If you select None, the user will not be required to change the password.

7. In the Responsibility tab, click in the Responsibility field. Select the LOV {...} that appears, and enter %iSupport% to query for Oracle iSupport responsibilities.

8. Choose the iSupport Employee User responsibility.

9. Under Effective Dates, enter an the effective date in the From field. If desired, enter an end-date for the user in the To field. Leave the To field blank to create the user with no end-date.

10. Save and close the window.

Assign Role(s) and Default Responsibility

1. Log in to the Applications login page as Oracle iSupport Administrator. Navigate to Administration > User.

2. Search for the user. After you find the user, select the underlined hyperlink of the username. The Personal Profile page appears.

3. Select Roles. Assign IBU_REG_USER and IBU_EMPLOYEE to the employee.

4. Save your work.

5. Return to the Personal Profile page. Select Responsibilities and assign iSupport Employee User as the *default* responsibility for this user. This responsibility has the key IBU_EMPLOYEE_USER_RESP.

6. Save your work.

> **Note:** When setting up new users of the Install Base functionality, please add the role, CSI_END_USER, to them. This role contains the required permissions for Oracle Install Base general users.

Set Related Profile Options

Set the profile option Oracle iSupport: Internal Organization for Employee Created Service Requests. For more information, see the Profile Options appendix, page A-6.

Verification

1. At the Applications login page, log in as the user just created.

2. Verify that appropriate menus are displayed. The Employee User has the following main tabs on the UI:

   • Home

   • Support (subtabs: Ask Me, Top Solutions, Technical Library, Forum, Service Requests)

3. Under the Profile button, the Employee User has access to the following links:

   User Profile:

   • Personal Profile

   • Contact Points

   • Addresses

   • Support

Setting Up Business (B2B) User

B2B (business users) are generally customers who have accounts on the merchant and are not associated with the merchant's company. These users select the Register Here link on the Applications login page to register.

Steps to Set Up B2B User

Follow the steps below to set up this user.

Registration

1. Select the Register Here link on the Applications login. Or, have the user self-register using the Register Here link.

2. Select Business User from the list of User Types. Select Next.

3. Enter the company ID in the textbox and Submit. The company ID is a unique number assigned during company registration.

4. Enter required information on the User Registration window. *Make a note of the username and password*. Select Next. The Available Enrollments window appears.

5. In the Enrollments window, select Self-Service Support Over the Web and select Next. A confirmation message appears. Select Next.

   > **Note:** When setting up new users of the Oracle Install Base functionality, add the role CSI_END_USER to them. This role contains the required permissions for Oracle Install Base general users.

Approval

1. Log in to the Applications login page as sysadmin. Navigate to Users > Registration > Pending Approvals.

2. In the Request Summary window, select the appropriate underlined username.

3. Fill in the mandatory information. Select Next.

4. Select the Accounts button. Choose the company account(s) to associate with the user. Select Next.

5. Enter any comments in the Comments area. Select Accept.

Verification

1. At the Applications login page, log in as the user just created.

2. Verify that appropriate menus are displayed. The B2B User will have the following main tabs on the UI:

   - Home

   - Account (subtabs: Orders, Invoices, Payments, Contracts, Returns, Products, Repair Orders)

   - Support (subtabs: Ask Me, Top Solutions, Technical Library, Forum, Service Requests)

3. Under the Profile button, the B2B User has access to the following links:

   User Profile:
   - Personal Profile

   - Contact Points

   - Addresses

   - Display Preferences

   - Accounts

   - Support

   - My Enrollments

     Company Profile:

   - Information

   - Contact Points

   - Addresses

   - Administrators

Setting Up Individual (B2C) User

The B2C (individual users) is typically an individual person with no relationship to the organization using Oracle iSupport. B2C users will normally be self-registering over the Internet, using the Register Here link on the Applications login page.

A B2C user's seeded approval process in the CRM User Management Framework is automatic. B2C users thus can access the application immediately after registering, unless you set up a separate approval process.

Steps to Set Up B2C User

Follow the steps below to set up this user.

Registration

1. Select the Register Here link on the Applications login. In the list of available user types, select Individual User. Select Next.

2. Enter required information on the User Registration window. *Make a note of the username and password.* Select Submit. The Available Enrollments window appears.

3. Select Self-Service Support Over the Web and select Next. A confirmation message appears.

Verification

1. At the Applications login page, log in as the user just created.

2. Verify that appropriate menus are displayed. The B2C User has the following main tabs on the UI:

   • Home

   • Account (subtabs: Orders, Invoices, Payments, Contracts, Returns, Products, Repair Orders)

   • Support (subtabs: Ask Me, Top Solutions, Technical Library, Forum, Service Requests)

3. Under the Profile button, the Employee User has access to the following links:

   User Profile:

   • Personal Profile

   • Contact Points

   • Addresses

   • Display Preferences

   • Accounts

   • Support

   • My Enrollments

Setting Up Knowledge Management Administrator-User

This is an administrator-user who performs Oracle Knowledge Management setup and management. This user is required only if a merchant uses the Knowledge Management functionality. Often the Oracle iSupport Administrator is set up to perform this function. For more information, see the *Oracle Knowledge Management Implementation and Administration Guide*.

Setting Up Survey Administrator-User

This is a user who performs Surveys setup and management. This User Type is not seeded in the JTT user management framework. This user is required only if a merchant uses Surveys. For more information, see the Setting Up iSupport Surveys , page 3-43 topic of this chapter.

Setting Up Guest User

A guest user is one who comes to the Oracle iSupport site and does not log in explicitly. Use this procedure to set up a guest user.

Steps

1. Create the fnd user.

2. Create any parties and accounts that must be linked to this user.

3. Set the appropriate value in the profile option Oracle iSupport: Guest User Responsibility Name, whose default value is iSupport Guest Responsibility.

4. Set the appropriate value in the profile option Oracle iSupport: Authenticated Guest User Responsibility Name.

5. Set the appropriate value in the profile option Oracle iSupport: Option to Display Quick Find to a Guest User, whose default value is N. If you decide to display the Quick Find menu to guest users, then also set up the appropriate search categories that can be displayed to guest users.

6. Set the appropriate value for the guest user in the profile option JTF_DEFAULT_RESPONSIBILITY.

7. Add the responsibilities IBU_GUEST_USER_RESP and IBU_AUTH_GUEST_USER_RESP to the guest user.

8. Assign the proper role to the guest user. The role IBU_GUEST_USER is shipped out of the box. Note that any permission assigned to the guest user role is granted to all

other users.

9. Set the guest user name and password with the Oracle Application Object Library profile option GUEST_USER_PWD in the format <user_name>/<password>.

10. Set up the guest user group. The required SQL is the following:

```
select party_id from hz_parties where party_id in ( Select
customer_id from fnd_user where user_name in (select
upper(b.attribute_value) from jtf_perz_data a, jtf_perz_data_attrib
b where a.perz_data_type ='JTF' and a.perz_data_name =
'guest_username' and a.perz_data_id = b.perz_data_id))
```

11. Run the concurrent program IBU_PRODUCT_UUGCP to populate the user group users.

12. If you want to hide certain categories from the Quick Find drop down, then set up the categories in the JTT system administrator console.

13. Hide the Logout button by creating the property in the JTT system console under iSupport. By default this is set up for IBU_GUEST_USER_RESP. If you up a different responsibility for the guest user, then set this up manually:

```
ui.nav.logout.disabled.resp.<resp key> = true;
```

14. If you want to use the home page, ibuhpage.jsp, as the login page for normal registered users, then modify the JTT property to set the .logout.page property to point to this JSP, and set this URL to be used to access Oracle iSupport. Otherwise, inform guest users of a special URL to use for guest user access.

15. Do not expose any functionality to guest users that have not been guest enabled.

16. If you do not want to expose all guest-enabled pages to guest users, then explicitly remove the corresponding permissions from the guest user role.

17. Optionally customize the message IBU_G_LOG_NOTE. This message is displayed to guest users, if the guest user feature is enabled, on the right hand side of Oracle iSupport pages. If you do not want to display the message, then set this message to "null."

> **Note:** Oracle iSupport uses same guest user that Oracle iStore uses. If Oracle iStore is being used, then you do not need to create a guest user, but you still need to do the other setups.

Setting Up Multi-Party Access

To set up multi-party access you must do the following:

Setup Profile option

Set the value of the profile option, Oracle iSupport: Enable Multi Party Access, to Yes at Site level.

Setup Responsibility

Set up menus for iSupport Administrator, Primary User, and business user to enable multi-party access pages. Out of the box menus are not setup for any responsibility to access UIs for multi-party. New functions and menus have been seeded for multi-party access feature.

To make the Party Access Menu visible to the Administrator as well as the Primary User, you need to navigate to System Administrator > Responsibilities. Once the Oracle Forms are opened:

For Administrator:

1. Query for iSupport Administrator - JTF Administration responsibility.

2. From the Menu Exclusions tab remove the function IBU_PARTY_ACCESS_FN and select Save.

For Primary User:

1. Query for iSupport Primary User responsibility.

2. From the Menu Exclusions tab remove the function IBU_PARTY_ACCESS_FN and IBU_SWITCH_PARTY_FN and select Save.

For Business User:

1. Query for iSupport Business User responsibility.

2. From the Menu Exclusions tab remove the function IBU_SWITCH_PARTY_FN and select Save.

Assign Permissions

Assign the following permissions to the iSupport Administrator, Primary User and business user roles.

For iSupport Administrator:

1. Select IBU_SYSTEM_ADMIN role and assign the following permissions to it:

- IBU_PARTY_USERS

- IBU_SEARCH_PARTY

- IBU_PARTY_ACCESS

- IBU_ASSOCIATE_PARTY

- IBU_PARTY_ACCOUNT_ACCESS

- IBU_PARTY_ACCOUNTS_VIEW

- IBU_PARTY_ACCESS_VIEW

- IBU_PARTY_REMOVE_VIEW

- IBU_DEFAULT_PARTY_VIEW

2. Ensure that the role IBU_SYSTEM_ADMIN is assigned to the iSupport Administrator.

For iSupport Primary User:

1. Select IBU_PRIMARY_USER role and assign the following permissions to it:

   - IBU_PARTY_USERS

   - IBU_SEARCH_PARTY

   - IBU_PARTY_ACCESS

   - IBU_ASSOCIATE_PARTY

   - IBU_PARTY_ACCOUNT_ACCESS

2. The permissions listed below may or may not be assigned to the Primary User. These permissions are for viewing the Accounts, Party Access, Remove Party, and Default Party columns respectively in the Party Access page.

   For example, if IBU_PARTY_ACCOUNTS_VIEW permission is not given to the Primary User then he will not be able to view the accounts column.

   - IBU_PARTY_ACCOUNTS_VIEW

   - IBU_PARTY_ACCESS_VIEW

   - IBU_PARTY_REMOVE_VIEW

   - IBU_DEFAULT_PARTY_VIEW

3. Ensure that the role IBU_PRIMARY_USER is assigned to the iSupport Primary User.

For iSupport Business User:

• Select IBU_Business_USER role and assign it the IBU_SWITCH_PARTY permission.

Grant Multi-Party Access

Follow the steps below to grant multi-party access to the business user.

Steps

1. Log in to the Applications login page as Oracle iSupport Administrator or Primary User.

2. Navigate to iSupport Administrator - JTF Administration > Administration.

3. Select the Party Access tab. The Party Access for Business Users page appears. Here you can add, remove, enable, or disable parties to the access list of a business user.

4. Find the user for whom you wish to provide party access and click Go.

5. Click the Party Access icon and the Party Access page appears.

6. The Party Access page displays the list of parties that the user has access to.

7. Click the Associate Party icon, and the Associate Party page appears with a list of parties.

8. Select one or more parties that you wish to add to the user, and click Save.

Grant Account Access

Follow the steps below to grant account access to the business user.

Steps

1. Log in to the Applications login page as Oracle iSupport Administrator or Primary User.

2. Navigate to iSupport Administrator - JTF Administration > Administration.

3. Select the Party Access tab. The Party Access for Business Users page appears.

4. Find the user for whom you wish to provide party account access and click Go.

5. Click the Party Access icon and the Party Access page appears.

6. The Party Access page displays the list of parties that the user has access to.

7. Click the Account icon to assign account access to the user for the selected party.

8. Select one or more accounts and click Save.

Switch Party

A business user must use this procedure to switch parties.

Steps

1. Log in to the Applications login page as an iSupport B2B user.

2. The Home page for the active party appears.

3. Click the Switch Party link. The Party Context page appears with the list of parties that you have access to.

4. Select a party and click Set Party Context. The party that you select becomes the active party.

Search Parties

Multi-party search enables a Business User to search service requests across all parties that the user has access to. To search across multiple parties, you must enable the IBU_CF_SR_PARTY attribute for the following AK regions:

- IBU_CF_SR_VW_FILTER

- IBU_CF_SR_VW_DSPL_OPTS_VALUES

- IBU_CF_SR_VW_SLTD_DSPL_OPTS – enable this to display the Party attribute under Selected Options

The above AK regions are used in the Create Service Request View and Search Service Request pages.

Steps

Follow the steps below to search service requests across multiple parties:

1. Log in to the Applications login page as an iSupport B2B user.

2. The Home page for the active party appears.

3. To display the service requests on the Support tab, click the Service Requests secondary tab.

4. Click the Personalize button.

5. Open a Service Request View or click the Create View button. You can create service request views to define search criteria.

6. The Update/Create Service Requests View page appears. In the Display Options section, the search criterion contains a Party field.

> **Note:** The system switches the party if a service request belongs to a party that is not an active party. For example, X is the active party and the service request you are searching for belongs to party Y. When you open a service request belonging to party Y, the system switches active party from X to Y before displaying the service request details.

Setting Up Sites

The optional site management framework enables multiple support sites for guest (anonymous) and customer users and provides the following features:

- Multiple support sites using a single instance

- Improved navigation between Oracle iStore, Oracle iSupport, and Oracle Partners

- Support and store functions in a single site

- Single sign on

- Improved self service registration

- Improved user profile

- Improved user management

For implementation with sites, Oracle iSupport uses the common site framework of Oracle iStore. This framework comprises the following elements:

- Login

- Logout

- Registration

- Site Definition

- Section Hierarchy

- Section Layout

- Template Manager

- Site Dashboard Bins

- Site Security

- Profile Management

- User Management

- Returns Creation

- Pages such as Orders, Invoices, Payments, Shipments, and Returns

For site setup instructions, refer to the *Oracle iStore Implementation and Administration Guide*, which contains scenarios that are specific to Oracle iSupport.

Setting Up Oracle iSupport Homepage

The Homepage is a work page and the application landing page for the user. Here, users can store service request and knowledge base links, as well as receive system alerts and other data that the merchant chooses to display. Options for Homepage setup include:

- Use default settings shipped with the application (some basic setups are required).

- Add bins from a pre-defined selection that ships with the application.

- Add content from Oracle Marketing Encyclopedia System.

- Disable content.

- Make content a required item (mandatory) on UI.

- Change display of mandatory content on UI.

The sections that follow discuss Homepage options.

Designing the Mandatory Content of the Home Page

You can set information on the home page as mandatory. Mandatory content has the following characteristics:

- Cannot be disabled by users

- Always appears at the top of the column that it is in

- Can be displayed as wide-format or narrow-format

Follow the steps below to change content to mandatory and choose its layout.

Steps

1. Log in to the Applications login page as the Oracle iSupport Administrator.

2. Navigate to Administration > Homepage. The Manage Home Page Content Page appears.

3. Select the Mandatory Layout tab. The Mandatory Layout by Responsibility page appears.

   Here you can define a mandatory layout for the home page for different responsibilities like iSupport Individual User, iSupport Employee User, and iSupport Guest User.

4. In the Select Responsibility LOV, select a responsibility and click Select. The page updates itself with the current layout information for that responsibility.

5. In the Mandatory Layout for Selected Responsibility region, use the arrows to move selected bins to design the desired layout for the home page for the selected responsibility.

6. Select Save. A confirmation message appears at the top of the page.

Designing the Default Content of the Home Page

Although the application provides default page layouts for all responsibilities, you can personalize these defaults. Users can further personalize them.

Follow the steps below to change the default content and choose its layout.

Steps

1. Log in to the Applications login page as the Oracle iSupport Administrator.

2. Navigate to Administration > Homepage. The Manage Home Page Content Page appears.

3. Select the Default Layout tab. The Default Layout by Responsibility page appears.

   Here you can define a default layout for the home page for different responsibilities like iSupport Individual User, iSupport Employee User, and iSupport Guest User.

4. In the Select Responsibility LOV, select a responsibility and click Select. The page updates itself with the current layout information for that responsibility.

5. In the Default Layout for Selected Responsibility region, use the arrows to move selected bins to design the desired layout for the home page for the selected responsibility.

6. Select Save. A confirmation message appears at the top of the page.

Editing Content Properties

Follow these steps to edit the properties of a content bin.

Steps

1. Log in to the Applications Login page as the Oracle iSupport Administrator.

2. Navigate to Administration > Homepage > Content. The Manage Home Page Content page appears.

3. To edit a particular bin, select its link under Content Display Name. The Edit Content page appears.

4. In the Content Properties region, use the fields and LOVs to define the general characteristics of the bin and the default number of rows displayed. You can define the content to be shown on the home page by associating a java, PL/SQL or HTML source to the content.

5. In the Content Access Control region, select the responsibilities with which you want to associate this content.

6. Click Associate Responsibility to add additional responsibilities to the list as needed.

7. Select Update to save your changes.

Adding Content to the Home Page

Follow these steps to edit the properties of a content bin.

Steps

1. Log in to the Applications Login page as the Oracle iSupport Administrator.

2. Navigate to Administration > Homepage > Content. The Manage Home Page

Content page appears.

3. To add a new bin, click Define Content. The Define Content page appears.

4. In the Content Properties region, use the fields and LOVs to define the general characteristics of the bin and the default number of rows displayed. You can define the content to be shown on the home page by associating a Java, PL/SQL or HTML source to the content.

    See the section "Seeded Classes for Seeded Bins", page C-71 in the Seeded Data chapter for a table of the available Java source files for seeded bins. Use these class files to create new bins if these bins are removed from the default setup. Enter the java class name in the Content Source Name field in the Content Properties region.

5. In the Content Access Control region, select the responsibilities with which you want to associate this content.

6. Click Associate Responsibility to add additional responsibilities to the list as needed.

7. Select Save to save your changes.

Adding Oracle Marketing Encyclopedia System Content

Oracle Marketing Encyclopedia System (MES) supplies some data for the home page, for example, the Alerts and Company News bins. You can also publish other types of information in MES and select it as home page content in Oracle iSupport.

Prerequisites

- Set up MES.

- Publish content within MES.

For details on implementing Oracle Marketing Encyclopedia System, see chapter 9.

Steps

1. Log in to Oracle Applications as the Oracle iSupport Administrator.

2. Navigate to Administration > Homepage > Content.

    The Manage Home Page Content page appears and shows the content including content from MES.

3. Click Add Content from MES. The Add Content from MES page appears.

4. Select the check box for any content that you wish to add.

5. Adjust the default rows as desired.

6. Click Add Content.

   The Manage Home Page Content page appears and shows your added content and a confirmation message.

Deleting Content from the Home Page

Deleting content from the Content Administration page removes content from current home pages. Use this procedure to delete a content bin.

Steps

1. Log in to Oracle Applications as the Oracle iSupport Administrator.

2. Navigate to Administration > Homepage > Content.

   The Manage Home Page Content page appears and shows the content.

3. Select the check box for the content that you want to delete.

4. Click Delete. The page reappears with the selected content deleted.

Enabling Homepage Subscription E-Mails

The Subscription E-Mails feature of Oracle iSupport allows users to receive Homepage content in an e-mail window. This can be useful if a user is unable to access the Homepage for a period of time.

Prerequisites

- The e-mail subscription feature must be activated for the user who is to receive the e-mails. Navigate to Profile > Support; select content and delivery frequency as desired.

- You must be running Oracle Workflow to enable this feature. For more information, refer to the chapter in this guide, *Integrating Oracle iSupport with Oracle Workflow*.

Setting Up the Message Body in Oracle Workflow

Using Oracle Workflow, open the workflow item type iSupport Home Page Subscription and modify the message body that lies under the message node Subscription Message. For further instructions, refer to the *Oracle Workflow User's Guide*.

Running Concurrent Programs

In Oracle (Forms) Applications, run the Notification Mailer and IBU_PRODUCT_EMGEN concurrent programs. See *Oracle E-Business Suite Concepts* for more information on running concurrent programs. For more information on Oracle Workflow, see the chapter in this guide, *Integrating Oracle iSupport with Oracle Workflow*. In addition, refer to the *Oracle Workflow User's Guide*.

Setting Up Service Request

See the chapter *Integrating Oracle iSupport with Service Request*.

Setting Up Oracle Knowledge Management

Oracle Knowledge Management is a comprehensive information management system that allows you to manage internal and external information using Oracle intelligent knowledge capture, storage, and distribution tools. It is a problem and solution management system and database. The solutions are separated by different criteria so that each solution has a specific meaning that relates directly to the issues being searched.

Oracle Knowledge Management allows easy solution capture and rapid access to new solutions. It is also designed to provide focused results and to reduce the cost of providing service while increasing customer satisfaction, thus helping companies compete in the marketplace.

For users of Oracle iSupport, Oracle Knowledge Management is important to browse, search, and write technical content. Some of the implementation tasks are the setup of the following:

- Solution categories

- Solution category groups

- Solution visibility

You are required to log into Oracle Knowledge Management to set up solutions. For details on setting up Oracle Knowledge Management, see the *Oracle Knowledge Management Implementation and Administration Guide*.

Setting Up Oracle iSupport Forums

The sections below details steps for setting up Oracle iSupport interactive forums.

Creating Categories

Categories help to organize forums into topic areas. Oracle iSupport allows you to set up as many categories as you wish. The steps below describe how to create a category.

Steps

1. At the Applications Login, log in as the Oracle iSupport Administrator.

2. Navigate to Administration > Forum > Category > Create. The Create New Category window appears.

3. You can choose to have the category exist at the topmost (root) level, or you can structure the category to be a sub-category of another category.

    Of course, the very first category that you create will be at the Category Root level. Thus, for the first one, leave the Choose a parent category field set to Category Root.

    Guidelines for creating additional categories:

    *   Leave the drop-down menu set to Root to create a category at the top-most level.

    *   Select the parent category to create a sub-category within a category.

4. Enter a name for the Category in the Enter the name of the new category field.

5. Select an Access Type. Access type determines who can view the category on the UI. Access options are:

    Open - All users can view/access.

    Restrict - Only members of a usergroup can view/access. For more information, see Restricting Access to Categories or Forums, page 3-39.

    Close - This option closes the category or forum to all users except the Oracle iSupport administrator. It can be utilized as a temporary state for a category or forum while the administrator is performing maintenance or setup tasks relating to the category or forum. It can also be used to permanently disable a category or forum.

6. Select Create. Respond to the confirmation message.

Creating Forums

Forums are focussed topic areas within broader categories. There is no limit to the number of forums you can create within any given category or sub-category. Follow the steps below to create a forum.

Steps

1. At the Applications Login, log in as the Oracle iSupport Administrator.

2. Navigate to Administration > Forum > Forum > Create. The Create New Forum window appears.

3. From the drop-down list, select the category within which you wish the forum to reside.

4. Enter a name for the forum in the Enter forum name field.

5. Select an Access Type:

   Open - All users can view/access.

   Restrict - Only members of a usergroup can view/access. For more information, see Restricting Access to Categories or Forums, page 3-39.

   Close - This option closes the category or forum to all users except the Oracle iSupport administrator. It can be utilized as a temporary state for a category or forum while the administrator is performing maintenance or setup tasks relating to the category or forum. It can also be used to permanently disable a category or forum.

6. Select Create. Respond to the confirmation message.

Restricting Access to Categories or Forums

In Oracle iSupport, the administrator has the ability to create categories and forums that only members of a usergroup can view and access.

> **Note: Note**: Restricted categories and forums do not appear to users who are not members of the usergroup associated with the restricted category/forum. You should inform users of the existence and nature of restricted areas so that they can request inclusion in them, if appropriate.

Set Restricted Access on Category or Forum

Use the procedures below to set the Access Type of Restricted on a category or forum.

Prerequisite

A category or forum has been created.

Steps

1. Log in to the Applications Login window as the Oracle iSupport Administrator.

2. Navigate to the Forum tab.

3. To change the access type of a category, navigate to Category > Modify Status. To change the access type of a forum, navigate to Forum > Modify Status. The Modify Access Status page appears for either forums or categories.

4. In the Modify Access Status page, select the category or forum you wish to restrict.

5. In the Choose access type area, select the Restricted radio button.

6. Select Next or Modify, depending upon which button appears. Respond to the confirmation message.

Create Usergroup

Follow the steps below to set up a usergroup to associate with the restricted category or forum. Only the usernames that are associated with the usergroup will be able to view the category or forum.

Steps

1. Log in to the Applications Login window as the Oracle iSupport Administrator.

2. Navigate to Administration > Support > Usergroup > Create.

3. Enter a unique name for the usergroup in the Name field.

4. Select a effective date for the usergroup using the Start Date calendar icon.

5. Select an ending date for the usergroup using the End Date calendar icon.

   You can also end date a usergroup to disable it.

6. Enter a brief description for the usergroup in the Description text field.

7. In the SQL statement field, enter an appropriate SQL statement.

   Sample SQL Usergroup Select Statement

   `select EMPLOYEE_ID from FND_USER where EMPLOYEE_ID > 0`

   This select statement retrieves all employee IDs greater than zero (i.e., all employees) from the fnd_user table.

   Note: Usergroup select statements support PARTY_ID and EMPLOYEE_ID, but not USER_ID.

8. Select Save.

Running Usergroup Creation Program

To populate necessary tables in the database, run the concurrent program Usergroup Creation Program (short name is IBUUG). This concurrent program must be run each time you update or add users to a usergroup.

Associate Usergroup to Restricted Category/Forum

Follow the steps below to associate a usergroup with a restricted category or forum.

Prerequisites

- A restricted category or forum has been created.

- A usergroup has been created.

- The usergroup creation concurrent program has been run.

Steps

1. At the Applications Login, log in as the Oracle iSupport Administrator.

2. Navigate to Administration > Forum > Usergroup > Associate.

3. Choose a category or forum from the drop-down list.

4. Select a Usergroup to associate with the Forum.

5. Select Associate.

6. A confirmation window appears.

Creating Forum Moderators

A Forum Moderator is a user designated to handle specific administrative tasks for message threads (groups of related messages).

Forum moderators can:

- Change the status (open or closed) of a message thread

- Change the distribution (public or internal) of a message thread - internal threads can only be viewed by employee users

- Delete message threads

Forum moderators cannot:

- Change access type of a category or forum

- Set up usergroups for restricted categories or forums

- Create forums or categories

- Move message threads from one forum to another

Steps for creating forum moderators are below.

Steps

1. Log in to the Applications Login window as the Oracle iSupport Administrator.

2. Navigate to Administration > Forum > Forum > Modify Attributes.

3. From the drop-down list, select a Forum where you wish to add a Moderator.

4. Select Next. The Modify Forum Attributes window appears.

5. Select the Add button under Moderator List area. The Add Moderator window appears.

6. Enter the name of the user who will be the Forum moderator.

   If necessary, search for the user:

   1. Enter partial search criteria, using % as a wildcard

   2. Select the radio button next to the appropriate username

7. After you have entered the appropriate name in the textbox, select Add. A confirmation message appears.

Deleting Forum Moderators

Use the steps below to remove a moderator from a forum.

Prerequisite

A forum moderator has been created.

Steps

1. Log in to the Applications Login page as the Oracle iSupport Administrator.

2. Navigate to Administration > Forum > Forum > Modify Attributes. The Modify Forum Attributes page appears.

3. From the drop-down list, select the forum from which to remove a moderator.

4. Select Next. The Modify Forum Attribute page appears.

5. Select a moderator to remove.

6. Under Moderator List, select Delete.

Setting Up Marketing Encyclopedia System

Oracle Marketing Encyclopedia System (MES) is required for technical library functionality in Oracle iSupport. It also supplies the Alerts bin content. Refer to chapter 9 for setup details.

Setting Up Account Inquiries

See the chapter in this guide Integrating Oracle iSupport with Products and Returns, page 5-1.

Set up and/or confirm the setup of Oracle Contracts Core, Oracle Service Contracts, and Oracle Sales Contracts. There are no contracts setups specific to Oracle iSupport. See the *Oracle Contracts Implementation and Administration Guide* for setup information.

Setting Up Oracle iSupport Surveys

The Surveys functionality of Oracle iSupport allows you to survey usergroups on topics of your choice. Surveys require you to set up Oracle Scripting. Follow the steps below to implement Surveys.

Setting Up Oracle Scripting

Oracle Scripting presents scripted messages which guide interaction center agents through their interactions with customers. With Scripting, Oracle introduced the survey component of Oracle Scripting, called iSurvey. Through the Scripting Survey component, enterprises can create, manage, and report on surveys to evaluate customer satisfaction, gain customer input on new initiatives, and gain other feedback from survey respondents. Oracle Scripting is one application module of Oracle's Interaction Center Suite of Applications.

Oracle Scripting consists of the following components:

• **Scripting Engine** - The simple graphical user interface that displays a script at an

agent's workstation via a browser or within an Oracle Window.

- **Scripting Author** - A script and survey development studio which is downloaded to a user's workstation. Scripting Author uses visual layouts to allow a script developer to create, modify, and deploy scripts for agents at the interaction center.

- **Survey Component** - An HTML user interface providing web-based surveys that can be deployed on the Internet, via email messages or direct links on enterprise web sites. The survey component contains all the tools needed to manage lists, set up survey campaigns, and provide result information.

Set up Oracle Scripting according to the *Oracle Scripting Implementation Guide*.

Create Surveys in Oracle Scripting

Oracle iSupport uses only the non-list-based types of surveys.

Create scripts in Oracle Scripting according to the steps and guidelines documented in the *Oracle Scripting Implementation Guide*.

Assign Survey Administrator Responsibility to an Oracle iSupport User

Assign the responsibility, Survey Administrator, to either an existing Oracle iSupport user (such as the Oracle iSupport Administrator), or to a special user created just for this purpose. See the *Implementation Tasks* chapter of this guide, Setting up iSupport Users, page 3-12 section, for details on how to set up users.

Steps

1. Log into Oracle iSupport as the Oracle iSupport Administrator.

2. Select Administration > User. Search for the user who will be the Survey Administrator, whether this is you as the Oracle iSupport Administrator or another user. Select the underlined hyperlink of the username.

3. In the Personal Profile Screen, select Responsibilities.

4. In the Responsibilities window, select the underlined hyperlink of the word, `Select`. A list of responsibilities appears. If necessary, search for the Survey Administrator responsibility. After you find it, select the Survey Administrator responsibility.

   Note: Do not set the Survey Administrator responsibility as the default unless you wish to force the user to log into iSurvey the next time the user logs in to the HTML Applications Login.

5. Save your work.

Set Up Oracle iSupport Survey in iSurvey

Surveys have three parts:

- **Header** - this is the header area of the survey

- **Error** - this is the error page that is displayed when an error occurs during the survey

- **Final** - this is the final page displayed to the user after the survey is complete

All of these parts you create as JSPs in the steps outlined in this section.

Follow the steps below to set up Surveys in the Oracle iSurvey module.

Steps

1. Log in to the Applications Login page as the user with Survey Administrator responsibility.

   If you are already in Oracle iSupport, you can change current responsibility: Navigate to Profile > Preferences and select the Survey Administrator responsibility from the Current Responsibility LOV on the General Preferences page. Select Update.

2. Navigate to Survey Campaign > Survey Resources. In the Resources window, select Create.

3. In the Create Resource window, create a Header page, a Final page, and an Error page according to the steps and guidelines documented in the *Oracle Scripting User Guide*, with the following exception:

   - Be sure to enter ibupfbgl.jsp in the File Name field for the Final page file. This is the Oracle iSupport JSP which lists the surveys you set up.

4. Navigate to Survey Campaign > Survey Campaign. Select Create.

5. In the Create Survey window, select the appropriate script using the Go button and the % as a wildcard.

6. Continue creating the survey by following the steps and guidelines documented in the *Oracle Scripting User Guide*, with the following exception:

   - For the Final page field, using the Go button, select the resource, **Oracle iSupport JSP** (ibupfbgl.jsp), created in step 3 above.

7. Select Create to save the survey.

8. Navigate to Survey Campaign > Cycle and set up a cycle to associate with the survey by following the steps and guidelines documented in the *Oracle Scripting User Guide*.

9. Navigate to Survey Campaign > Deployment and create a deployment for the survey by following the steps and guidelines documented in the *Oracle Scripting User Guide*.

10. Deploy the survey by clicking on the Deploy button. Oracle iSupport will only display surveys which have the status of Active and whose dates fall within current dates. See the *Oracle Scripting User Guide* for additional information.

Make Survey Available in Oracle iSupport

After you have created the survey in iSurvey, you need to select it in Oracle iSupport and then associate a usergroup(s) to the survey. Follow the steps below to activate the survey in Oracle iSupport. This section contains three parts:

- Set up usergroup.

- Run Usergroup Creation concurrent program.

- Select Survey and Usergroup in iSupport.

Set Up Usergroup

Follow the steps below to set up a usergroup to associate with any surveys that you have created in iSurvey. Only the usernames that are associated with the usergroup(s) selected will be able to view the surveys that you have created.

Steps

1. Log in to the Applications Login window as the Oracle iSupport Administrator.

2. Navigate to Administration > Support > Usergroup > Create.

3. Enter a unique name for the usergroup in the Name field.

4. Select a effective date for the usergroup using the Start Date calendar icon.

5. Select an ending date for the usergroup using the End Date calendar icon.

   You can also end date a usergroup to disable it.

6. Enter a brief description for the usergroup in the Description text field.

7. In the SQL statement field, enter an appropriate SQL statement.

Sample SQL Usergroup Select Statement

```
select EMPLOYEE_ID from FND_USER where EMPLOYEE_ID > 0
```

This select statement retrieves all employee IDs greater than zero (i.e., all employees) from the fnd_user table.

Note: Usergroup select statements support PARTY_ID and EMPLOYEE_ID, but not USER_ID.

8. Select Save.

Run Usergroup Creation Concurrent Program

To populate necessary tables in the database, run the concurrent program Usergroup Creation Program (short name is IBUUG). This concurrent program must be run each time you update or add users to a usergroup.

Select Survey and Usergroup to Associate to Survey

Use the following steps to associate the usergroup(s) with surveys that you have created in iSurvey. Only members of the usergroup(s) will be able to view and respond to surveys.

1. Log into Oracle iSupport as the Oracle iSupport Administrator.

2. Navigate to Administration > Support > Survey. Select Add New Survey. The Survey Detail window appears with a drop-list of active surveys.

3. Select the desired survey from the drop-list, and then select a usergroup(s) to associate with the survey, by clicking on one or more of the check boxes.

4. Select Create to save the changes.

5. To take the created survey(s), log into Oracle iSupport as a member of a usergroup associated with a survey, and navigate to Support > Survey.

View Survey Results

Oracle iSurvey allows you to view the results of your surveys. The following steps can assist you in retrieving survey results. For complete information, refer to the *Oracle Scripting Implementation Guide* and the *Oracle Scripting User Guide*.

Steps

1. Log in to iSurvey as a user with Survey Administrator responsibility.

    From Oracle iSupport, to switch current responsibility, select the Profile > Preferences menu to switch current responsibility to the Survey Administrator

responsibility. You must select the Update button to save changes.

2. In iSurvey, navigate to Response > Survey. Follow the steps and guidelines documented in the *Oracle Scripting User Guide* to view and manage your survey results.

Enabling Employees to File Service Requests for Assets

Employees can request service on assigned assets, such as laptop computers, or shared internal assets, such as network printers. Thereby an enterprise can provide a complete set of service management capabilities for assets across channels.

Oracle Enterprise Asset Management maintains information about enterprise assets. An enterprise can use the checkin and checkout capabilities of Oracle Enterprise Asset Management to assign assets to employees. Oracle Install Base replicates this asset information and makes it available in a common definition with customer products.

Perform the following steps in iSupport to integrate with Enterprise Asset Management.

Prerequisites

❏ Oracle Enterprise Asset Management must be fully configured to define assets.

Steps:

1. Set up the profile option Service: Default Maintenance Organization.

   The default maintenance organization is a constraint on the list of assets that an employee user can view. An item that is associated with an asset should belong to this maintenance organization.

2. In Oracle TeleService, set up service request types and map them to the responsibility assigned to employee users.

   In the setup page for service request type, make sure to select both the Asset Maintenance check box and the Web Entry check box for the service request type being used for reporting a service request against assets.

3. Using AK regions, configure the service request user interface for the Create Service Request page in Oracle iSupport to enable the asset-related fields.

   The related outermost regions are as follows:

   • IBU_CF_SR_ASSIGNED_ASSETS

   • IBU_CF_SR_ALL_ASSETS

   For instructions on configuring AK regions, refer to Appendix E and Configuring Oracle iSupport Service Request Pages, page E-1.

The assets that have been checked out for an employee now appear in the Assigned Asset LOV.

Setting Up Integration with iMarketing

Oracle iSupport supports both Oracle iMarketing Classic and Lite versions out of the box. After you have completed the Web campaign setup, perform following setup in iSupport:

1. Enable the profile Oracle iSupport: Page Level Configuration Option.

2. Update the Web HTML call of the corresponding function with:

   • amsWebPlacement.jsp if you are using the iMarketing classic version.

   • amsLitePlacement.jsp if you are using the iMarketing Lite version.

   For a list of page configuration FND functions that map to individual sections on each page, refer to the section "Functions and Variables for Page-Level Configurability" in this guide.

3. Associate the menu IBU_DEFAULT_CONFIG_MENU with the root menu of the responsibility that displays the Web advertisement.

Setting Up Oracle iSupport Web Call-Back

The Web Call-Back (Call Me) feature allows users to submit a call-back request via the Oracle iSupport UI. The web call-back requires implementation of:

• CRM Interaction Center (formerly Call Center Technology - CCT) suite

• Oracle Universal Work Queue (UWQ)

• Oracle Customer Care

• Oracle CRM Foundation, Notes module

The purchase of call center hardware also is required.

This section provides an overview of the call-back functionality in Oracle iSupport. For more information, refer to the CRM Interaction Center documentation.

Outside of Oracle iSupport, the call routing process is essentially this: After the call-back entry is made by the user, Oracle iSupport sends the request to the CCT server group specified by the Oracle iSupport Administrator on the Oracle iSupport UI. The CCT applications and hardware route the request to the UWQ server. The UWQ server decodes the customer information (the Notes module captures comments from user) and assigns it to the UWQ client, and the call request immediately pops up in an agent's

window in Oracle Customer Care.

There are very few setups required in Oracle iSupport after the dependencies listed above are installed and functioning properly. Oracle iSupport simply calls one of the CCT APIs to provide the list of available call center server groups that appear the Oracle iSupport UI.

Refer to Oracle CRM Interaction Center documentation for information on setting up the underlying products which enable the Web Call-Back functionality in Oracle iSupport.

After the CCT and UWQ applications and call center hardware are installed and implemented, you can use the steps below to set up Call Me in Oracle iSupport.

Steps:

1. Log into Oracle iSupport as the Oracle iSupport Administrator.

2. Navigate to Support > Call Me.

3. In the Call Me Administration window, select a call center server group from the LOV.

4. Select the default note type.

5. Select Update to save the data.

Setting Up Customer Care

Set up and/or confirm the setup of Oracle Customer Care. Refer to *Oracle TeleService Implementation and User Guide*.

Setting Up Page-Level Look and Feel

An administrator can configure the look and feel ofOracle iSupport JavaServer Pages (JSPs) for different users without customizing these pages directly. This is accomplished by putting customized material in the top, left, right, and bottom sections of the original content pages that Oracle supplies. Oracle provides functions that you use to associate your own JSPs with each section of a given Oracle iSupportpage. Then such a page dynamically includes your pages in a user's browser. Refer to the Seeded Data appendix for the table of pages that you can configure in this way together with their corresponding functions.

General Steps to Perform JSP Configuration

Here are the general steps to configure the high-level look and feel of a content page.

Steps

1. Determine what you want to appear in the four regions around an Oracle iSupport content page. Regions can be intentionally left blank. If they are blank, then the content region expands into blank regions.

2. Write the JSP that will provide the intended output. Probably write some simple HTML to test the configuration framework to see if the output is placed correctly. Pay attention to have matching end tags for all starting tags, especially for <table>, <tr>, and <td>. A mismatch of tags results a misplacing of the different regions in the standard user interface. Refer to the Appendix B table, page C-63 for variables that you can use in customizing a JSP.

3. Determine in which page or pages to place the custom JSP. Each page in Oracle iSupport has four sections corresponding to four different function names.

4. Map the functions for the content page to the corresponding customized JSPs that you created. Refer to the mapping section, page 3-51 for details of this step.

5. Map the menu IBU_DEFAULT_CONFIG_MENU to the menu corresponding to the responsibility to which you want to expose a custom JSP. Refer to the responsibility-mapping section, page 3-52 for details on how do to this.

   The reason for this step is responsibility security. Responsibilities can show or not show a custom JSP by having a different configuration menu. For example, IBU_GUEST_CONFIG_MENU can contain several functions and can be attached to the menu corresponding to a guest user. A business use, for example, does not see a custom JSP that is tied only to a guest user.

6. Make sure that the functions that correspond to the custom JSPs are not part of excluded menu items. In the responsibility window, ensure that none of the functions that correspond to a custom JSP are in the excluded item table.

7. Copy your customized JSP into the $OA_HTML directory, which was established when the configuration files for your web server were set up. This is the location where the process looks to find customized JSPs.

8. Turn on the following profile option to enable page level configurations: Oracle iSupport: Page Level Configuration Option.

9. Restart your web server, navigate to the page that has a customized JSP, and check the result.

Mapping Customized JSPs to Customizing Functions

Use this procedure to map your customized JSPs to regions of a content page in order to

alter the high-level look and feel of that page.

Steps

1. Using the Forms mode and the Application Developer responsibility, navigate to Application > Function. The Form Functions window appears.

2. Using Appendix B, determine the functions that correspond with the page sections that you want to customize.

3. In the Description tabbed page, query these functions. The results populate the window, including the Web HTML tabbed page.

4. In the Web HTML tabbed page, in the HTML Call column, enter the name of your customized JSP that corresponds with each listed function. Include ".jsp" in the name.

5. Save your work.

Mapping Page-Level Configuration Functions to Responsibilities

For a custom JSP to adjust the high-level look and feel of a content page, the mapping function for the JSP must be in the menu corresponding to the responsibility to which you want to expose the custom JSP. You can add functions individually, but often a more efficient way is to map the menu IBU_DEFAULT_CONFIG_MENU or a variant of this menu. This is the case because IBU_DEFAULT_CONFIG_MENU is associated with full access and thus already contains all the configuration functions. As an example of mapping, the seeded responsibility iSupport Business User has the seeded menu IBU_BUS_USER_TOP_MENU. You must attach IBU_DEFAULT_CONFIG_MENU to IBU_BUS_USER_TOP_MENU for a custom JSP to appear. Use this procedure to map IBU_DEFAULT_CONFIG_MENU to the menu for a responsibility.

Steps

1. Using the Application Developer responsibility, navigate to Application > Menu. The Menus window appears.

2. Use the Menu or User Menu Name fields to query for the name of the menu that is associated with the responsibility to which you want to expose a custom JSP.

3. Create a new sequence line with IBU_DEFAULT_CONFIG_MENU in the Submenu field. Doing so calls in the functions in this menu. Leave the Prompt field blank because normally you do not want a user to see the function list.

4. Save your work.

Setting Up Custom Menus

Oracle iSupport is fully integrated with the Custom Menu (custom navigation) feature of the JTT tech stack. You can write a new menu renderer by implementing a JTT custom menu class and associating it with different Oracle iSupport responsibilities. Thus you can create a different menu look and feel for different users. For details and sample code, refer to Appendix C. For more comprehensive information and sample code, refer to JTT developer documentation.

4

Integrating Oracle iSupport with Service Request

This chapter covers the following topics:

- Overview of Service Request Functionality in Oracle iSupport
- Overview of Dependencies
- Overview of Setup Steps
- Setting Up Oracle TeleService
- Setting Up Oracle Notes
- Set Visibility of Note Types as Publish to View in Oracle iSupport
- Restrict Note Types Viewed in Oracle iSupport
- Setting Up Service Requests in Oracle iSupport
- Set Up iSupport Service Request Profile Options
- Enabling Incident Addresses
- Set Up Service Request Defaults
- Set up Service Request Templates
- Setting Up Display of Service Request Type Categories
- Configuring Service Request Pages
- The Service Request Creation Flow
- Defining Regions
- Contexts for Rendering Service Request Pages and the Creation Flow
- Mapping Page Regions
- Editing Mappings for Page Regions
- Mapping Creation Flows

- Editing Creation Flows

- Setting Up Products

- Using Knowledge Management in iSupport Service Request

- Setting Up E-mail Submission of Service Request Details

Overview of Service Request Functionality in Oracle iSupport

Oracle iSupport features the ability to create, update, and track service requests. It does this through integration with Oracle TeleService. The service request feature of Oracle iSupport also includes optional product selection and association, knowledge management queries, and e-mail submission of service request details.

The main features of service request functionality in Oracle iSupport are:

- Customizable templates for gathering information from users during request creation.

- Enforceable or optional knowledge base search during request creation.

- Enforceable or optional product selection during request creation.

- Customer ability to re-open a closed request. Administrator ability to set a time limit on re-opening a closed request.

- Customer ability to update an existing request by adding notes, attachments, or re-opening within a specific time frame.

- Customizable service request flows and pages

- Delivery of submitted service request information to users via e-mail.

Overview of Dependencies

Oracle TeleService provides the bulk of the service request functionality in Oracle iSupport. Oracle TeleService tracks all service issues reported by customers and employees of the merchant. It does this through agent and customer input and integration with other Oracle applications.

In addition to the dependency upon Oracle TeleService, other service request functionality within Oracle iSupport can be highly dependent upon additional applications, depending upon the features you elect to implement. These other applications include:

- Oracle Workflow for processing e-mails.

- Oracle Inventory and Oracle Install Base for products data.

- The following Oracle Common Application Components:

Assignment Manager (Assignment Engine) - Manager is required for service request functionality in Oracle iSupport and Oracle TeleService. Oracle iSupport calls the assignment manager to determine the owner (resource) of a service request. Who the assignment engine picks as the owner is dependent upon: request type, severity, urgency, status, problem code, product, and answers to template questions. If the assignment engine is unable to find an appropriate owner, the system picks the default resource and resource type configured in the profile options.

Notes - The Notes module is required for service request functionality in Oracle iSupport and Oracle TeleService. Service request processes use notes to capture data during creation and update. Administrators must set up note types and map them to Oracle iSupport.

Resource Manager - The Resources module is optional for service request functionality in Oracle iSupport, unless you are going to set up and use Resources as owners of service requests.

Territory Manager - Territory Manager is optional for service request functionality in Oracle iSupport.Territory Manager allows you to define rules in Assignment Manager.

Task Manager - The Tasks module is optional for service request functionality in Oracle iSupport, unless you are going to assign Tasks based on service request activity. Tasks allows you to create and assign work items to Resources. You create tasks, for example, to call back a customer or dispatch a service engineer to the customer site to fix a problem. A task may be assigned to an individual employee, a team, or a group.

Overview of Setup Steps

In order to use the service request functionality of Oracle iSupport, you must:

- Set up the Oracle TeleService application, which supplies the base functionality. See Setting up Oracle TeleService, page 4-4.

- Set up the Notes module, which allows the capture of textual information in service request functionality. See Setting up Notes, page 4-4.

In addition to setting up the basic functionality, you can choose to implement additional, optional functionality, including:

- Products integration (See Setting up Products.), page 4-17

- Knowledge base integration (See Knowledge Management in iSupport Service Request.) , page 4-17

- E-mail of service request data to users (See Setting up E-Mail Submission of Service Request Details.), page 4-17

Setting Up Oracle TeleService

Setting up Oracle TeleService includes, but is not limited to, the following setups for service request functionality:

- Status codes

- Severity

- Duplicate checking

- Automatic task creation

For information on performing service request setups, refer to the *Oracle TeleService Implementation and User Guide.*

Setting Up Oracle Notes

The Notes module of Oracle Common application Components enables the entire suite to create, maintain, and share notes related to customers, opportunities, service requests, and other business objects. Notes allows the capture of extensive, textual, project relevant information within Oracle applications. Notes comes seeded with predefined note types which you can use, or you can define new note types of your own.

See the *Oracle Common Application Calendar Implementation Guide* for more information.

Set Visibility of Note Types as Publish to View in Oracle iSupport

For a note to be viewed in Oracle iSupport, the visibility of the note must be set to Publish.

Restrict Note Types Viewed in Oracle iSupport

Because note types are used across Oracle products, it is important to restrict the note types that can be viewed in Oracle iSupport. If you do not do this, all note types used across applications are displayed in the service request default settings page in Oracle iSupport.

Prerequisite

- Note types have been set up.

Steps

1. Log on to Oracle Forms as sysadmin and select the Customer Support responsibility.

2. Navigate to Setup > Notes > Source and Note Type Mapping. The Mapping Objects window appears.

3. Find the Source Object *Public Service Requests*:

    1. Enter Query mode (F11).

    2. Enter Public Service Requests in Source Object field.

    3. Execute the query (Ctrl + F11).

4. Ensure that the note types you are using are mapped to iSupport in the Application column.

For more information on setting up Notes, see the *Oracle Common Application Calendar Implementation Guide*.

Setting Up Service Requests in Oracle iSupport

This section outlines the service request setups that are specific to Oracle iSupport. Topics include:

- Set up iSupport Service Request Profile Options, page 4-5

- Set up Service Request Defaults, page 4-6

- Set up Service Request Templates, page 4-7

Set Up iSupport Service Request Profile Options

There are profile options that control the user of some service request functionality in Oracle iSupport. See the appendix, Profile Options, for details.

Enabling Incident Addresses

Oracle iSupport provides the ability to dispatch Field Service technicians to locations for field related work regardless of whether the address is permanent or one-time. The term one-time incident address means that the incident address is only a temporary address to be used one time for the service request for which it was created as well as for the tasks created for that specific service request. Other Service applications such as Oracle Field Service can reference the address when they are performing tasks related

to the resolution of the service request. However, the address is not visible from outside the originating service request and its tasks and cannot be used by any other service request or application outside Service. For example, the one-time address cannot be displayed in any address LOV outside the service request for which it was created.

Incident addresses are stored in Oracle Trading Community Architecture. If real-time address validation is set up, then the address is validated during address entry and saved, or not saved, based on the validation process. For Oracle Trading Community Architecture, and other Oracle E-Business Suite applications, this validation is based on the information and setup of Geography Hierarchy. See: *Geography Hierarchy Overview, Oracle Trading Community Architecture Administration Guide.*

Oracle iSupport makes available the site name, site number, site phone, and addressee fields for the incident address. These four fields are in the AK incident address region, which administrators can expose and configure as desired. During service request creation, the site phone field is not displayed. In update service request mode, the site phone is a read-only field. The site name and addressee fields are enabled during the creation and update of a one-time incident address. A party site and location are created for every new one-time incident address. The party site is associated with the service request customer party.

In create service request mode, if the profile HZ: Generate Party Site Number is set to Yes, then the site number field is disabled, and the site number is auto-generated when the service request is saved. If the profile is set to No, then the site number field is enabled and is mandatory. For iSupport, after a service request is created, the incident address is not updatable using the iSupport UI.

Appendix E and Example 1: Customizing a Top-Level Attribute, page E-1

Set Up Service Request Defaults

Using the following steps, Oracle iSupport administrators can control service request default settings.

Steps

1. Log into Forms as System Administrator.

2. Navigate to Profile > System.

3. Set defaults for the following:

4. **Default Severity** - Default Severity for new Service Requests.

5. **Default Status** - Set a Default Status for new Service Requests. The Default Status is the status assigned to the Service Request at creation.

6. **Closed Status** - From the Closed Status list, set a default for closed Service Request.

7. **Default Create Notetype** - Set a default for the notetype used when a Service Request is created.

8. **Default Update Notetype** - Set a default for the notetype used when a Service Request is updated.

9. **Default Escalate Notetype** - Set a default for the notetype used when a Service Request is escalated.

10. **Default Closed Notetype** - Set a default for the notetype used when a Service Request is closed.

11. **Default Resource Type** - From the Default Resource Type list, set the default resource type. This indicates the resource type associated with the Default Resource ID (see below).

12. **Default Resource ID** - From the Default Resource ID list, set the person/group who will be the default resource for Service Request routing.

13. **Reopen SR Time Limit** - Set the timeframe in hours during which a closed Service Request can be opened.

Set up Service Request Templates

Service request templates provide a structured, formatted method of gathering information during Service Request creation. Templates characteristics include:

- Administrator-defined questions that gather information about service requests; these questions can be configured so that the user is required to answer them.

- Administrator-defined free-form and choice-type answers that relate to the questions posed on the template.

- Weighting of choice-type answers used to determine severity of service requests automatically.

- Ability to associate a template with a specific product and/or urgency.

Templates are presented to the customer/user during request creation as questions and responses.

The information gathered from the templates assists in:

- Routing the service request to the appropriate support agent or support group in Oracle TeleService.

- Determining the severity of the service request in Oracle TeleService.

This topic area includes:

- Creating New Templates, page 9-15

- Setting Up a Default Template , page 9-21

Creating New Templates

Use the steps below to begin creating a new service request template.

Steps

1. Log in to the Applications login as Oracle iSupport Administrator.

2. Navigate to Support tab and then Request Template tab.

3. In an empty text box in the Template Name column, enter a meaningful name for the new template.

4. Select Add.

5. Next, select effective dates for the template. Click on the hyperlink of the template name. The Modify Template window appears.

6. In the Template Info area, select the calendar icon next to the Start Date field and choose an effective start date for the template. Do the same for End Date. (You can also use the End Date function to disable existing templates.) All of the date steps are optional.

7. Select Update.

8. Next, associate the template with a product. Select the underlined hyperlink of the appropriate template. The Modify Template window appears.

9. In the Associate Attribute, Attribute to Associate: Product area, select Modify. The Associate Product window appears.

10. From the Available Product list, select the desired association(s) and use the right (>) arrow button to move them to the Associated Product column. Select Update and then Back (bottom of window) to return to the Associate Attribute area of the Modify Template window.

11. Next, associate an urgency to the template. Select the underlined hyperlink of the appropriate template. The Modify Template window appears.

12. In the Associate Attribute, Attribute to Associate: Urgency area, select Modify. The Associate Urgency window appears.

13. From the Available Urgencies list, select the desired association(s) and use the right (>) arrow button to move them to the Associated Urgencies column. Select Update and then Back (bottom of window) to return to the Associate Attribute area of the Modify Template window.

14. Next, define questions and answers for the template. Select the underlined hyperlink of the appropriate template. The Modify Template window appears.

15. **Set up Questions on Template:** In the Modify Template window, the Template Detail area will list any questions associated with the template. If none is associated, there will be an empty text box. Enter a question for the template in the empty Question field.

16. Select Answer Type: You have two options for Answer types:

17. Choice - This is a pick-list type answer and can be used in scoring. Scoring is used for determining the Severity of the Service Request.

18. **Free Text** - This is a free-form answer; you can specify the number of lines allowed for the answer (see below). This answer cannot be used in scoring.

19. If your question requires a Choice-type answer, select whether you wish the answer to be used in scoring/weighting when determining severities for submissions which use this template (see Set Severity Thresholds below). Answers to the question will be weighted from 1 to 9 during the Answer setup (see Set up Answers for a Choice Question below).

20. To enforce that the user is required to answer the question, select Yes in the Response Required field. Mandatory questions force the user to provide an answer before the application will continue creating the request. To make the question optional for the end user, choose No.

21. Select Add. The window refreshes, with the question appearing as an underlined link in the Template Detail area.

22. To sort the questions, select Sort and use the up and down arrows in the Sort Questions window to arrange the questions in the desired order. Use the back button to return to the Modify Template page.

23. Optionally, to edit a question, click on the hyperlink of the question you wish to modify.

24. Set up Answers for a Choice Question: In the Template Detail area, click the underlined hyperlink of a question. The Define Question and Answer window appears.

25. Enter an answer for the question in an empty textbox.

The answers you set up here becomes a pick-list for the end user, and the answer you select as a default appears as the default answer on the user side.

26. For each Choice-type answer, set a value of 1-9. After the end user answers the questions, the application will add up these values and the final score will be used to determine the severity of the Service Request, based on the Severity Thresholds you set (see below).

27. For Text-type questions, you will not need to determine answers. Instead, in the Define Question and Answer window, select the number of rows the user will be limited to when answering.

28. Select Update to save changes, and Back to return to the previous window.

29. Next, set up severity thresholds for the template. Select the underlined hyperlink of the appropriate template. The Modify Template window appears.

Use the Set Severity area to set Severity Thresholds for the template. The severities listed here come from the Severity setups in TeleService. For each Severity, enter a value in the Start and End Threshold boxes. Do not define overlapping thresholds or ranges (see examples, below). The weighting you gave to each scorable question in the defining answers step above will be calculated and used here. The user responses to all questions used in scoring are averaged, and the score determines the severity level.

The sum score from all of the scorable answers is determined by the application and compared to the total possible. The percentage is determined by the application, and the appropriate threshold is assigned. See the example below for clarification.

Note: You do not need to define thresholds for all of your severities, only the ones you wish to use. Also: You can select one of the severities as a default and all templates use that severity. Severities for which you do not define thresholds are ignored by the application.

Sample scenario related to this setup

You have defined a new template with two questions on it. Each question has three possible answers, for a total of six answers defined by the administrator, and two possible answers for the user (user can only select one answer per question).

In this example, you have set up each of the question's three answers with identical scores: 1, 4, and 5. Since the user can only select one answer per question, the highest possible score in this scenario would be 10 (highest score for each question is 5, and 5 plus 5 is 10). (The user cannot see these scores.)

The user selects an answer from the first question with a score of 1. He selects an answer from the second question with a score of 4. Thus, the total of the two answers is 5. The application find the score of 5 and compares it against the total possible answer points, which in this case is 10. From there, the application formulates a percentage of answers scored (5) verses a total possible score (10). The

percentage in this case is be 50%. Then, based on the severity thresholds you set (see the example below), the application determines the severity, for example, high, medium, and low. Here are the thresholds set for this example:

High - Start Threshold = 61%; End Threshold = 100%

Medium - Start Threshold = 31%; End Threshold = 60%

Low - Start Threshold = 0%; End Threshold = 30%

30. When finished entering severity thresholds, select Update. When finished entering severity thresholds, select Update.

Setting Up a Default Template

Oracle iSupport uses the Default Template you set up when users select a product and urgency combination for which a template does not exist.

Only one default template is allowed, and it is shown regardless of any attributes.

Prerequisites

- A Service Request template has been created in Oracle iSupport.

- The service request template feature has been enabled by selecting Yes in the Enable Template LOV on the service request defaults window.

Steps

1. Set up a new template with general questions. The questions should be "catch all" type questions related to service requests. Use the following procedure to set the default template.

2. In the list of templates, in the Set as Default column, select the radio button next to the appropriate template.

3. Select Update.

Setting Up Display of Service Request Type Categories

This section discusses the control of the display of service request type categories.

Prerequisites

The administrator of Oracle TeleService must have defined service request type categories.

Steps

1. Turn on or off the display of the name and the description of the service request type categories.

    To do so, define the following attributes of region IBU_CF_SR_SELECT_REQUEST_TYPE:

    o IBU_CF_SR_REQ_TYPE_CAT_NAME

    o IBU_CF_SR_REQ_TYPE_CAT_DESC

    Use attribute IBU_CF_SR_REQ_TYPE_CAT_NAME to control the display of the name of the service request type category. Use attribute IBU_CF_SR_REQ_TYPE_CAT_DESC to control the display the description of the service request type category. By default, the display boxes of these attributes are selected. If the display boxes of both attributes are cleared, service request type categories are not shown in the Service Request Type Selection page. Instead, the service request types are shown in the same way as they were shown immediately before this feature was available.

2. Set one-column or two-column layout.

    Service request type categories and associated service request types can be displayed in one-column layout or two-column layout. If the number of categories exceeds the number defined in the profile Oracle iSupport: Select Service Request Type Layout Option, then categories are displayed in two-column layout. Whether service request type categories are shown in one-column layout or two-column layout, a service request type is always shown in one-column format under its category. If service request type categories are not shown, then use the same profile, Oracle iSupport: Select Service Request Type Layout Option, to control the display of service request types in one-column layout or two-column layout.

3. Define the Others category.

    All service request types that do not belong to any category are displayed under Others if the service request type category is shown. To change the name and description of this category, change the values of the IBU_CF_SR_REQ_TYPE_NOTMAP and IBU_CF_SR_REQ_TYPE_NOTMAP_DESC attributes of the IBU_CF_SR_SELECT_REQUEST_TYPE region.

4. Be aware of and optionally utilize the behavior of the parameter ibuSRRequestTypeCategoryID, which can be passed to the Service Request Type Selection page as a URL parameter. For details of what happens when a service request type category ID is passed through this parameter, see the Parameters section of the Profile Options and Parameters chapter.

Configuring Service Request Pages

Oracle iSupport provides a flexible framework with which merchants, system administrators, and customers can configure service request pages for their company use. You can configure the content of page regions, the regions that pages display, and the pages that appear in the create-service-request flow. Even without this ability, the default flow and pages support most of the desired functionality. Configurations can be turned off easily with a profile option, Oracle iSupport: Region/Field Level Configuration Option. If they are turned off, then the application renders the default flow and page structure.

The Service Request Creation Flow

The standard creation flow for a service request has five steps:

1. Identify Problem

2. Provide Problem Details

3. Get Suggested Solutions

4. Provide Contact Information

5. Review the service request

Users who have the responsibility Oracle iSupport: iSupport Self-Service Helpdesk have their own seeded flow, which consists of the following three steps:

1. Identify Problem

2. Get Suggested Solutions

3. Review and submit the service request

During configuration you typically use a bottom-up procedure in the following order to define:

1. Details of regions

2. The combination of regions that define a page

3. The topmost region of a region combination for a displayed page

4. For the create-service-request flow only: the displayed pages and their names

> **Note:** The Project-related fields are hidden out of the box and can be

hidden or displayed based on the mapping of the AK region. For more information, see *Configuring Oracle iSupport Service Request Pages*, page E-1. The fields that are displayed are Expenditure Org, Project Number, Project Name, Project Task Number, and Project Task Name.

Also check the profile Oracle iSupport: Available Repositories for Knowledge Search. This profile specifies the repositories to search for in the Suggested Solutions page during the Create Service Request flow

Defining Regions

In the setup of regions you define the details of regions and the combination of regions that define a page. To illustrate region configuration, consider this example. Suppose that a page contains one top region and that this top region contains two subregions, Customer Name and Customer Address. You can change the order of these two subregions, and, inside each subregion, you can change the order of the attributes and even hide some attributes. To do so, you select, copy, and edit the seeded service request regions defined in Appendix B. This requires using the Application Developer Common Modules responsibility, the Regions window, and other windows for this responsibility. For details on this setup, refer to documentation for Oracle self-service Web applications. For examples of configuring Oracle iSupport service request pages, see Appendix D.

Contexts for Rendering Service Request Pages and the Creation Flow

The appearance of the service request creation flow and the appearance of service request pages that are rendered depend on context. Context applies to all service request pages, not just those in the creation flow. The application checks a hierarchy of contextual states in the following order:

1. Service request type-responsibility

2. Service request type

3. Responsibility

4. Application

5. Global

The rendering process proceeds as follows. A user chooses a service request type when creating a service request. Given the page code that the user is trying to render, the service request type, and the user's current responsibility, the application determines the corresponding region that stores the configuration information. If no specific configured region exists for this combination of page code, service request type, and

responsibility, then the application seeks the configuration stored at the level of service request type. If the application cannot find it there, then it goes one level higher to the responsibility level for the user's current responsibility. The application continues in this manner, going up the chain to application level if needed. If none is available, then it fetches the global configuration information, which is provided out of the box.

Mapping Page Regions

Use this procedure to map top-level region codes to pages.

Prerequisites

You must already have defined regions according to the mapping section, page 4-14.

Steps

1. Using the iSupport Administrator responsibility, navigate to Configuration > Page Region Mapping. The Page Region Mappings page appears.

2. Click Create Mapping. The Create Page Region Mapping page appears.

3. Use the Page LOV to select a page.

4. Use the Context LOV to select contexts. The remaining fields change to be compatible with a selected context.

5. Select values for the remaining mapping fields. Use the flashlight search icon as needed. The region code that you select is the code for the corresponding topmost region that you defined according to the section, page 4-14.

6. Click Create.

Editing Mappings for Page Regions

Use this procedure to edit mappings of page regions.

Steps

1. Using the iSupport Administrator responsibility, navigate to Configuration > Page Region Mapping. The Page Region Mappings page appears.

2. Search for the page and region mappings by entering your search criteria in the Page and Context fields, and click Go. The search results appear in the Results region.

3. Click the Edit icon for the page that you want to update. The Update Page Region

Mapping page appears.

4. Select a new region code and click Update. The Page Region Mappings page re-appears and shows your updated mapping.

5. Click Update.

Mapping Creation Flows

Use this procedure to map creation flows:

Steps

1. Using the iSupport Administrator responsibility, navigate to Configuration > Flow Mapping. The Service Request Creation Flows page appears.

2. Click Create Flow. The Create Service Request Creation Flow page appears. Here you specify the pages to be displayed in the flow and the contexts for which the flow is available.

3. In the Flow Information region, enter a name for your flow.

4. In the Flow Pages region, select the Enabled Flag check box for each page that you want to appear in the flow. Clear a check box to remove a page from the flow.

5. As needed, change the name of a page to be consistent with the content that you have defined for it.

6. In the Flow Contexts region, click Add Context to define the contexts for the flow. The Service Request Creation Flow: Add Context page appears.

7. Use the LOVs and lookup features to enter the contexts for which the flow applies.

8. Click Add Context. The Create Service Request Creation Flow page appears and shows the added context.

9. Click Create.The Service Request Creation Flows page appears and contains the name of the new flow in the list of flows.

Editing Creation Flows

Use this procedure to edit flow mappings of service request pages.

Steps

1. Using the iSupport Administrator responsibility, navigate to Configuration > Flow

Mapping. The Service Request Creation Flows page appears.

2. Search for desired flow by entering your search criteria in the Flow Name and Context fields, and click Go. The search results appear in the Results region.

3. Click the Edit icon for the page that you want to update. The Update Service Request Creation Flow page appears.

4. Make the changes and click the Update. The Service Request Creation Flows page appears and shows the flow.

5. Click Update.

Setting Up Products

Service request functionality in Oracle iSupport allows users to associate products with service requests and allows administrators the option of enforcing product selection during request creation. Products also can be associated with service request templates set up by administrators. To enable product association, you must set up Oracle Inventory and Oracle Install Base.

See the *Integrating Oracle iSupport with Products and Returns* chapter of this guide for more information.

Using Knowledge Management in iSupport Service Request

The creation of new service requests can be reduced by allowing or enforcing users to search a knowledge base prior to submission. Oracle Knowledge Management must be set up to facilitate this functionality in Oracle iSupport.

See the *Oracle Knowledge Management Implementation and Administration Guide* for more information.

Setting Up E-mail Submission of Service Request Details

Service request functionality in Oracle iSupport allows users to have the details of a service request e-mailed to them by clicking a button on the service request verification window.

The application that facilitates the e-mail submission is Oracle Workflow. See the *Integrating Oracle iSupport with Oracle Workflow* chapter of this guide for more information.

Note: A valid e-mail address must be set up for the user in his profile in order for the e-mail feature to work.

5

Integrating Oracle iSupport with Products and Returns

This chapter covers the following topics:

- Understanding Integration with Products and Returns
- Setting Up Oracle Inventory
- Setting Up Bills of Materials
- Setting Up Oracle Install Base
- Enabling Returns Functionality
- Understanding Returns in Oracle Order Management
- Understanding Returns in Oracle iSupport
- Setting Up Oracle Quoting
- Setting Up Oracle Order Management
- Guidelines
- Troubleshooting Returns in Oracle iSupport
- Set Up Oracle Advanced Pricing
- Set Up Oracle Shipping
- Set Up Oracle Purchasing

Understanding Integration with Products and Returns

This chapter details how to integrate Oracle iSupport with the applications that provide products and returns functionality.

Several processes within Oracle iSupport require the use of products and purchasing-related applications, including:

- Creating and processing returns

- Viewing invoice information

- Viewing payments data

- Viewing shipment information

- Creating and updating service requests

- Viewing the repair status of an item by repair order tracking

- Maintaining products databases, such as customer products and inventory items

The information in this chapter is designed to provide the merchant implementing Oracle iSupport with setup details directly related to Oracle iSupport.

The applications that integrate with Oracle iSupport and provide products repository and returns functionality include:

- Oracle Inventory

- Oracle Bills of Materials

- Oracle Install Base

- Oracle Order Management

- Oracle Order Capture APIs

- Oracle Shipping

- Oracle Advanced Pricing

- Oracle Purchasing

- Oracle Service Contracts

- Oracle Customer Care portion of Oracle TeleService

A full installation and setup of each product or purchasing application must be performed in order for the functionality to perform as described. For more information, refer to the specific product documentation for full implementation details.

Setting Up Oracle Inventory

Oracle Inventory supplies the infrastructure that holds an organization's entire product repository and configuration. It integrates closely with Install Base, which is the repository of customer- or party-purchased products.

Both Inventory and Install Base may be required for service request functioning, Products tab functionality, and Account tab functionality in Oracle iSupport.

For information on how to set up Oracle Inventory, see the *Oracle Inventory User's Guide* for basic information and further references.

Setting Up Bills of Materials

Oracle Bills of Materials (BOM) is an application that allows the configuring of groups of products into coordinated and complementary systems. Within BOM, you can define product relationships and create products with multiple components and subcomponents. BOM integrates with Inventory and Install Base.

BOM is an optional integration with products and returns functionality in Oracle iSupport.

If using BOM, setup Oracle Bills of Materials. Refer to *Oracle Bills of Material User's Guide.*

Setting Up Oracle Install Base

OracleOracle Install Base is a repository that maintains customer items in a tree structure. The application maintains all the customer details, installation details, product information, and applicable service agreements. The application uses the concurrent program, Install Base Interface, to populate tables when new data is added.

Oracle iSupport uses Oracle Install Base for:

- Retrieving customer item data in the Account tab

- Adding item instances to Oracle Install Base using the Item Instances tab

- Retrieving customer item instances while creating service requests

Confirm the setup of Oracle Install Base. Refer to *Oracle Install Base Implementation Guide*
.

> **Note:** When setting up new users of the Oracle Install Base functionality, please add the role CSI_END_USER to them. This role contains the required permissions for Install Base general users.

Enabling Returns Functionality

The following applications and relevant dependencies are necessary for returns functionality in Oracle iSupport:

- Oracle Order Capture APIs

• Oracle Order Management

Understanding Returns in Oracle Order Management

In Oracle Order Management, RMA is often used synonymously with Return or Credit Orders and Returned Material. An order can have a mix of outbound (regular) and inbound (return) lines, if not restricted by the order type definition. Credit order types are of the order type category Return, while an order with Mixed order type category can contain both regular and return lines. Each order type and each line type is associated with a workflow process. The Line Type Category associated with the Line Type determines if it is a return. Line types can be variations of Return, such as Return with Approval, Return for Credit Only, and have a line type category of Return.

Oracle Order Management supports a variety of methods for returning products. An agent or administrator decides at the time of authorizing the return how to process the request. For example, an agent can accept the return and process a credit for the customer, updating all sales activity and credit balances. Or, the agent may accept the return for replacement and enter a replacement order instead of issuing a credit.

Examples of returns supported by Oracle Order Management:

RMA with Credit Only - Company issues a credit without the customer returning the product.

RMA with Repair - Customer returns damaged product. Company repairs and returns the product to customer.

RMA with Replacement - Customer returns a product. Company sends a replacement product rather than issuing a credit.

RMA with Receipt and No Credit - Customer returns a product sent to him on a trial basis or at no charge. Company does not issue a credit.

RMA with Receipt and Credit - Customer returns a product. Company issues a credit.

Returned Item Fails Inspection - Customer returns product. Company inspects product and rejects it. Company either destroys product or sends product back to customer.

Process Flow:

1. Create an RMA in Oracle iSupport.

2. Book the RMA into Oracle Order Management through Oracle Order Capture API.

3. Receive the RMA using the Receipts form of Oracle Purchasing.

4. Check the on-hand quantity of the item in inventory to verify that the correct quantity was received.

5. Fulfill the RMA line.

6. Generate a credit memo in Oracle Invoicing.

7. View the credit memo in Oracle Order Management.

8. Check the Shipped and Fulfilled quantity on the RMA line.

Understanding Returns in Oracle iSupport

Oracle iSupport allows users to create a return by providing a UI that calls Oracle Order Capture APIs to submit the return to Oracle Order Management and perform customer validation. Oracle iSupport does not create the return to Oracle Order Management directly.

Navigation to the returns feature is Account tab > Return > Create Returns.

Process Flow:

Following is the process flow for creating a return within Oracle iSupport. For information on Oracle Workflow items associated with returns, refer to the chapter in this guide called *Integrating Oracle iSupport with Oracle Workflow*.

1. Within Oracle iSupport, the user accesses the Create Return window.

2. User enters orders associated with his account number(s). The user must have an exact order number to create a return. Only orders that have been ordered (booked) can be returned.

3. The user provides the following information:

   • Account Number - This must be the account number associated with the order.

   • Contact for the company returning the item, if appropriate.

   • Bill to address - User must enter a bill to address. This indicates where the credit will be sent if the credit memo cannot be applied to an invoice. User can select alternate address using the drop list.

   • Ship from address - User will be see a default ship from address; this indicates where the return is originating from. User can select alternate address using the drop list.

   • Return reason - A return reason must be specified for each line being returned.

4. User selects the lines to be returned. Only items that are "returnable" can be returned. Only returnable lines display a select check box.

5. The page calculates the credit amount for the user; this is the amount of the order line. The ordered amount is the net selling price per unit multiplied by the quantity ordered.

6. Having selected a valid order item and quantity, the user clicks Create Return, and Oracle iSupport submits the return to Oracle Order Management through the Oracle Order Capture API. If the return submission is successful, then the user receives an RMA number. If Oracle Order Management/Oracle Quoting return any errors, then Oracle iSupport captures and displays them on the next page. When the return is booked, the same order line cannot be returned twice.

7. After creation of the return from Oracle iSupport, the return is handled by Oracle Order Capture API, Order Management, Oracle Purchasing, Workflow APIs, Oracle Inventory (or Oracle Install Base), and Oracle Receivables.

Setting Up Oracle Quoting

Set up Oracle Quoting according to the latest *Oracle Quoting Implementation Guide*. This enables access to the Order Capture APIs that are required for returns functionality in Oracle iSupport.

Returns Profile Options

The following profile options must be set to allow returns functionality in Oracle iSupport:

*   **A**SO: Default Order Type - Set to Mixed.

*   ASO: Default Order State - Set to Booked.

Setting Up Oracle Order Management

Using the Oracle Order Management Suite, you can enter sales orders, calculate the price of items on order lines, fulfill the orders -- for example, by shipping the items -- and send information to an accounts receivable system so that invoices are created. The core Oracle Order Management products are:

*   Oracle Order Management - required for returns in Oracle iSupport

*   Oracle Shipping Execution (SE) - required for returns in Oracle iSupport

*   Oracle Pricing

These products are included when Oracle Order Management is purchased. Additional products are available which are also integrated with Oracle Order Management, and these include:

- Oracle Advanced Pricing - required for returns in Oracle iSupport

- Oracle Configurator

- Oracle Accounts Receivable - a dependency for general Oracle iSupport setup

- Oracle Advanced Planning and Scheduling

Confirm the setup of Oracle Order Management. While the steps in this section can assist you in setting up Order Management, you will need to refer to *Oracle Order Management Implementation Manual* for complete setup information.

Set Up Transaction Type Line Types

Order Management transaction types classify orders and returns. Credit order types are of the order type category Return.

In order for the returns feature to work properly, the default order type in Order Management must be set to Mixed. This is controlled by the profile option, ASO: Default Order Type = Mixed.

The following steps can assist you in setting up Order Management Line Types. For setup information, refer to the *Oracle Order Management Implementation Manual*.

Steps

1. Log in to Oracle Forms; select Order Management super user or administrator responsibility.

2. Navigate to Setup > Transaction Types > Define. The Transaction Types window displays.

3. Query for Mixed (you must enter the word exactly as shown here) in the Transaction Type field. (Use F11 and Ctrl +F11 to query.) The Transaction Types window populates with the information for the Mixed transaction type.

4. Place the cursor in the Order Category field and select an Order Category of Mixed.

5. Place the cursor in the Default Return Line field and select a Default Return Line Type of Return (Receipt).

6. Place the cursor in the Default Order Line Type field and select a Default Order Line Type of Standard (Line Invoicing).

7. Access the Line Workflow Assignments window by selecting the Assign Line Flow button.

8. In the Access the Line Workflow Assignments window, add a new record.

9. In the Set Line Type field, select Standard (Line Invoicing) from the LOV.

10. Select an appropriate Item Type to populate the Item Type field.

11. In the Set Process Name field, select Line Flow Generic from the LOV.

12. Select an appropriate Start Date.

13. Add a second record.

14. In the Set Line Type field, select Return (Receipt) from the LOV.

15. Select an appropriate Item Type to populate the Item Type field.

16. In the Set Process Name field, select Line Flow Return for Credit with Receipt.

17. Select an appropriate Start Date for the record.

18. Select Ok. Save the changes.

Guidelines

Here are some useful guidelines when using the application:

- When the lot controlled and serialized items are returned, the serial number entered by the user is not validated against an Inventory serial number or the original order serial number. However, the serial number is captured in the RMA lines and is viewable in Oracle Receivables.

- Currently, Oracle Install Base does not get updated automatically when a serialized item is returned.

- ATO/PTO configurations are configured items. For example, a configuration such as a computer system can consist of many items. Fulfillment of the entire configuration is required before crediting. The usage of fulfillment set can achieve the result of triggering crediting only after the entire configuration is fulfilled.

- Oracle Order Management allows the return of freight and other special charges.

Troubleshooting Returns in Oracle iSupport

To find out what is wrong in case the Create Return fails in Oracle iSupport, it is helpful to properly generate a debug file from Oracle Quoting or Oracle Order Management when a return is created. Use the following procedure.

Steps

1. Inside the database, one of the v$parameter, utl_file_dir, needs to be set to the debug file directory. Specify the correct directory in the init.ora file to set this.

2. Ensure the settings on the following Oracle Order Management (OM) and Order Quoting (ASO) profile options:

   • OM: Debug Level

   • OM: Debug Log Directory - This directory needs to be the same as the directory pointed to by utl_file_dir above.

   • ASO: Enable ASO Debug - Set to Yes.

Additional information on this topic is available in the *Profile Options* chapter of this guide.

Set Up Oracle Advanced Pricing

Order Management uses Oracle Advanced Pricing for determining prices of goods sold; therefore, it is a mandatory module for returns execution.

Confirm the setup of Oracle Advanced Pricing. Refer to *Oracle Advanced Pricing Implementation Guide* for setup details.

Set Up Oracle Shipping

Oracle Shipping Execution provides shipping execution for Order Management and is necessary for the returns integration. It is mandatory for returns in Oracle iSupport.

Refer to *Oracle Shipping Execution User's Guide* for setup details.

Set Up Oracle Purchasing

The Receipts form of Oracle Purchasing receives an RMA when it is booked. Therefore, it is a mandatory module for returns execution.

Confirm the setup of Oracle Purchasing. Refer to *Oracle Purchasing User's Guide*.

6

Integrating Oracle iSupport with Oracle Workflow

This chapter covers the following topics:

- Oracle Workflow Overview
- Workflow Client
- Workflow Server
- Overview of Oracle Workflow Functionality in iSupport
- Service Request
- Returns
- Homepage Subscription E-mails
- Knowledge Management
- User Approvals
- Setting up Oracle Workflow
- Party Access Notification

Oracle Workflow Overview

Oracle Applications comes with Oracle Workflow (WF) already installed as part of the Applications Object Library (AOL). WF consists of two tiers:

- Workflow Client (Workflow Builder)
- Workflow Server

The sections below provide an overview of these two tiers.

Workflow Client

Workflow Client is the Workflow Builder which is used by Workflow developers to create or modify custom workflows. This is installed on selected Windows clients only.

Workflow Server

The Workflow Server consists of the following elements:

Workflow Engine: Monitors workflow states and coordinates the routing of activities for a process. Changes in workflow state -- such as the completion of workflow activities -- are signalled to the engine by a PL/SQL API or Java API. Based on flexibly-defined workflow rules, the engine determines which activities are eligible to run, and then runs them. The Workflow Engine supports sophisticated workflow rules, including looping, branching, parallel flows, and subflows.

Workflow Notification Mailer (WFMAIL): Electronic mail (e-mail) users can receive notifications of outstanding work items and can respond to those notification using their e-mail application of choice.

- **Note:** Email notifications will only be sent if the Workflow mailer is setup and configured properly. The PHP/Self Service Workflow notifications page can also be used to view notifications. Please refer to the Workflow documentation for more information on how to start and configure the workflow mailer.

Workflow Definitions Loader (WFLOAD): The Workflow Definitions Loader is a utility program that moves workflow definitions between the database and corresponding flat file representations. You can use it to move workflow definitions from a development to a production database, or to apply upgrades to existing definitions. In addition to being a standalone server program, the Workflow Definitions Loader is also integrated into Oracle Workflow Builder, allowing you to open and save workflow definitions in both a database and a file.

Workflow Monitor: Workflow administrators and users can view the progress of a work item in a workflow process by connecting to the Workflow Monitor using a standard Web browser that supports Java. The Workflow Monitor displays an annotated view of the process diagram for a particular instance of a workflow process, so that users can get a graphical depiction of their work item status. The Workflow Monitor also displays a separate status summary for the work item, the process, and each activity in the process.

Message Delivery Scheduler Concurrent Program:

Workflow Background Engine/Workflow Background Process Concurrent Program: A supplemental Workflow Engine that processes deferred or timed-out activities.

Purge Obsolete Workflow Runtime Data Concurrent Program (WF_PURGE): This program purges obsolete item types runtime status information.

For more information on Oracle Workflow, see the *Oracle Workflow User's Guide*.

Overview of Oracle Workflow Functionality in iSupport

The sections that follow describe Oracle Workflow's relationship to Oracle iSupport. For more information on Oracle Workflow, see the *Oracle Workflow User's Guide*.

Service Request

Oracle iSupport features the ability to create, update, and track service requests. It does this through integration with Oracle TeleService.

Service request types can be linked to an Oracle Workflow process that can be automatically launched when a service request is created, or manually launched in the service request window in Oracle TeleService. Oracle Workflow automatically notifies service personnel about their assignments based on service request. When a service request is escalated, Oracle Workflow processes and delivers the notifications regarding escalation activity.

Oracle iSupport also uses Oracle Workflow to submit service request details to users. This is done via the *Email this to me* button during service request creation.

For more information, see:

- *Oracle Workflow Guide*

- *Oracle TeleService Implementation and User Guide*

- *Oracle iSupport Implementation and Administration Guide: Integrating Oracle iSupport with Service Request*

Returns

When a customer books a return in Oracle iSupport, Oracle Workflow picks it up using the seeded workflow, Order Flow - Return with Approval. Next, Oracle Workflow uses the Return for Credit with Receipt workflow to send the return to the Return Receiving Line stage. Then, the receiving agent from Oracle Purchasing uses Oracle Purchasing to pull up the Return Material Authorization (RMA) to verify and mark the items as received. The agent then selects a destination for the product(s), such as Oracle Inventory. As the receiving agent does this, a Workflow API is invoked to move the workflow to the next stage, and Order Management receives data that updates the RMA as appropriate. The workflow now waits in Oracle Inventory. It is here that an agent verifies and indicates in Inventory that the correct quantity has been received. When a configurable item set (BOM-enabled) is returned, the workflow will wait here until all items are checked into the inventory. The workflow will next invoke the Accounts Receivable interface APIs. After all of the items are fulfilled, an invoice is generated and a credit memo can be generated through the Oracle Invoice auto-invoice

master program.

For more information, see the chapter, *Integrating Oracle iSupport with Products and Returns*.

Homepage Subscription E-mails

The Homepage e-mail subscription feature uses Oracle Workflow to process e-mails. This can be useful if a user is unable to access the Homepage for a period of time. The user signs up for the subscription e-mails through the Profile > Support menu. In the Support page, the user can select the days that the e-mails should be sent and whether the e-mails should be HTML or text-based. The system then uses Workflow to send the e-mails to the address setup in the Profile > Contact Points menu.

For more information, see the Setting up the Oracle iSupport Homepage topic in the *Implementation Tasks* chapter.

Knowledge Management

Oracle Workflow is essential for the solution authoring feature of knowledge management. Using Workflow, the authoring process allows users to define the steps in processing content. The process can be as simple as a single step, author-publish, or can include several approval stages prior to publication. In an approval-dependent process, Workflow allows content to be rejected back to the previous stage or a selected previous stage. Individuals involved in solution authoring can be assigned to specific groups that are aligned with specific stages and categories of content, and these groups can be sent e-mails notifying them of the status of content.

For more information, see the chapter, *Integrating Oracle iSupport with Oracle Knowledge Management*.

User Approvals

The approvals notifications used in the Oracle User Management Framework are dependent upon Oracle Workflow. The workflow notifications provide e-mails to user approvers notifying them that they have users in the queue waiting to be approved. Workflow also sends e-mails to users notifying them that they have been approved for an application. For more information, see the *Oracle Workflow User's Guide*.

Setting up Oracle Workflow

For instructions on setting up Oracle Workflow, refer to the *Oracle Workflow User's Guide* and the *Oracle Workflow Developer's Guide.*

Party Access Notification

The multi-party access feature uses Oracle Workflow to send email notifications to an iSupport B2B user whenever a party is added, removed, disabled, or enabled for the user.

Use this procedure to enable email notification:

Package Name: IBU_MULTIPARTY_PUB

Procedure Name: send_email_notification

(p_user_id IN SYSTEM.IBU_NUM_TBL_TYPE,

p_party_id IN SYSTEM.IBU_NUM_TBL_TYPE,

p_operation_type IN SYSTEM.IBU_VAR_3_TBL_TYPE)

Description: The public procedure is provided as a hook for sending the email notification to B2B users once the party access is added or removed. Value of p_operation_type:

A - for Adding party to the access list of the user

R - for removing party from the access list of the user

File Name: ibuspubs.pls, ibuspubb.pls

7

Integrating Oracle iSupport with the Oracle Applications Framework (OAF)

This chapter covers the following topics:

- Overview of Integration with Oracle Applications Framework
- Conventions for Interoperability with OAF-Based Applications
- Setting Up an Oracle Shared Service Request Bin

Overview of Integration with Oracle Applications Framework

Interoperability with Oracle Applications Framework

Oracle iSupport is based on an existing, fully supported Oracle HTML standard, JTT. Other Oracle applications are based on a newer Oracle HTML standard, Oracle Applications Framework, OAF. Applications based on OAF, such as Oracle Internet Expenses, can initiate service requests through Oracle iSupport by using the interoperability feature that Oracle iSupport provides. More generally, OAF-based applications can call all the Oracle iSupport service request pages. Basically, all the FND functions associated with the Oracle iSupport service request pages have been changed to type INTEROP so that OAF-based applications can properly render the JTT-based service request pages.

Selected Oracle iSupport pages have a Cancel or a Return button whose function is to return the application focus to the destination page defined by the parameter ibuReturnURL. OAF-based applications must pass this parameter to Oracle iSupport as defined in Conventions for Interoperability with OAF-Based Applications, page 7-2.

The Oracle Shared Service Request Bin

The sharable service request (SR) bin is an Oracle Applications Framework (OAF) region. Any OAF page can include this sharable region through personalization. No code is needed to include this region. This chapter contains the steps on how to include the sharable SR region in an OAF page as well as how to personalize your sharable service request bin. The guidelines require that you have a full understanding of the

functionality of the shared service request bin as well as OAF personalization.

Conventions for Interoperability with OAF-Based Applications

For the integration of Oracle iSupport and Oracle Application Framework (OAF), Oracle iSupport establishes the parameter ibuReturnURL to carry the return URL for Cancel buttons in the service request module. When a user clicks these Cancel buttons, the focus of the application goes to the destination page provided by this parameter. Therefore, an OAF-based application must specify this parameter and pass it to Oracle iSupport in a URL so that page flow can go back to the desired page.

For interoperability with OAF-based applications, Oracle iSupport has the following conventions for the ibuReturnURL parameter. The value for ibuReturnURL has this format: ibuReturnURL=PageFunc%26param1=v1%26Param2=v2%26param3=v3. For security reasons, ibuReturnURL must point to an FND function name instead of an actual JSP name or JRAD file name. PageFunc can be either a JTT function pointing to a JSP file or an OA function pointing to a JRAD file. You can also define the parameters inside the function as usual. Extra parameters like param1, param2, and param3 can be used as dynamic runtime parameters. Interoprability requires "%26" in front of these extra runtime parameters instead of '&'. "%26" is the standard encoded value for "&" and will be converted back to "&" automatically when Oracle iSupport gets the value from the requesting object. Whenever the Oracle iSupport code uses Redirect and needs to put ibuReturnURL inside the URL, the code will convert "&" to "%26" again so that it can be passed correctly.

To return successfully to the page specified by parameter ibuReturnURL for both JTT and OAF cases, Oracle iSupport has the following logic for the Cancel button on the service request creation and detail pages. If the actual value for ibuReturnURL does not contain "OA.jsp", then Oracle iSupport treats it as one JTT page and uses Forward to return to that page. If it contains "OA.jsp", then Oracle iSupport treats it as one OAF page and uses SendRedirect to return. If the parameter ibuReturnURL is null, then it returns to the home page by using Forward.

In some integration cases, Oracle iSupport service request pages may be launched on a new window. In such cases, when a user clicks the Cancel button on the service request creation page or the main service request detail page, the new window should be closed instead of returning to the destination URL. For this requirement, Oracle iSupport has the parameter ibuCloseWindow. If this parameter is set and its value is 'Y' and a user clicks the Cancel button, then the application closes the window regardless of whether the parameter ibuReturnURL is passed or not.

The service request confirmation page has a Return button. The functionality behind this button is the same as that for the Cancel button on the service request creation flow and detail flow. When user clicks the Return button, the focus returns to the destination page defined by parameter ibuReturnURL. If this parameter is null, then it goes back to the home page by default. Also, if parameter ibuCloseWindow is passed and its value is 'Y', then this parameter takes a higher priority, and the window is closed when the user clicks the Return button. Besides the logic included with this button, Oracle iSupport

also includes the item IBU_CF_RETURN in the seeded region
IBU_CF_SR_CR_CONFIRMATION_BTN. By default its show flag is set to be false.

Setting Up an Oracle Shared Service Request Bin

Adding the Sharable Service Request Bin to Your OAF Page:

Use the following steps to include the sharable service request bin into your OAF page:

1. Ensure that the shared service request bin library is included in your class path.
   OAF cannot include this bin if it is not in its class path.

2. Logon as an administrator.

3. Using personalization, include the shared service request bin.

4. In the Personalization page, click Create Item for the region in which you want to
   include the SR bin.

5. Choose the Site level from the Level LOV.

6. Choose the Stack Layout style from the Item Style LOV.

7. In the Extends field, enter
   `/oracle/apps/ibu/shared/sr/webui/SharedSRBin`

8. Click Apply.

9. Click Return to Application to see the shared SR bin in the OAF page.

   You should now be able to see the shared SR bin in your OAF application.

Creating Seeded Views:

Use the following steps to create a seeded view for your service request bin:

1. Click the Personalize Advanced Table: (SRTableRN) link from the OAF page.

2. Click Seeded User Views in the Advanced Table region.

3. Click Create View to take you to the Create View Personalization page.

4. Do the following in the Create View Personalization page:

   1. Enter a view name.

   2. Select the Set as Default check box if you want this view to be the default view.

3. Select the columns to be displayed by shuttling the columns to the left or right in the region titled Attribute Properties.

4. In the region titled Search Query to Filter Data in your Table, provide the necessary criteria for your seeded view . You can additional criteria from the LOV.

5. Click Apply.

5. Click Apply again to take you to the Personalization page of the advanced table region.

6. Click Return to Application to return to your OAF page.

Personalizing Your Service Request Bin:

The following are guidelines to further personalize your service request bin. To begin, click Personalize Service Requests from the shared SR bin. In the Personalization page, click Expand All to see all the SR region parameters within the InputParameters region.

Personalizing the Create Service Request Button Destination

The Create Service Request button has a default destination of OA.jsp?OAFunc=IBU_FROM_OAF_CREATE_SR. The IBU_FROM_OAF_CREATE_SR function points to the Create Service Request page of iSupport. If you would like to pass in more parameters to the Create SR page, such as the SR type ID, then create a function that contains the parameters and use this function as the destination for the Create SR button. To do so, click the Personalize icon of the Button: Create Service Request item, and provide an initial value in the Initial Value text input field.

Example

Button: Create Service Request – Destination URI:
`OA.jsp?OAFunc=IBU_CREATESR_TYPEID`

Adding Object Code, Object ID, and Summary Parameters to the iSupport Create Service Request Page

You may want to provide the object code, object ID, and summary parameters to the iSupport Create Service Request page when you click the Create Service Request button. To provide these parameters, you must personalize and type an initial value for the following:

• Create SR Source Object Code – for the object code

• Create SR Source Object ID' – for the object ID

• Create SR Source Object Num – for the summary, which includes the object number

If you do not provide a value for Create SR Source Object Code, then neither the object code nor the object ID parameters are passed to the iSupport Create SR page. Similarly, if you do not provide values for the object code and the object number, then the summary parameter that contains these two values is not passed to the iSupport Create SR page.

Examples

- Create SR Source Object Code – Initial Value: `EXPENSEREPORT`

- Create SR Source Object ID – Initial Value:
  `WebExpensesAM.ExpenseReportHeadersVO.ReportHeaderId`

- Create SR Source Object Num – Initial Value:
  `WebExpensesAM.ExpenseReportHeadersVO.InvoiceNum`

The object code must be defined as a JTF object. Steps to create a new JTF object are as follows:

1. Login to Forms Application as System Administrator.

2. Navigate to Task Management Object.

3. Query an object such as EXPENSEREPORT. Verify whether this object already exists.

4. If the EXPENSEREPORT object does not exists, then create a new object with name and code for EXPENSEREPORT.

Adding Object Code and Object ID as Additional Search Criteria When Searching for a Particular Service Request

To view only those service requests that are associated with an object code and an object ID, personalize and type an initial value for the following:

1. Search SR Source Object Code, for the object code

2. Search SR Source Object ID, for the object ID

If you do not provide a value for Search SR Source Object Code, then neither the object code nor the object ID values are used in the search regardless of whether the Search SR Source Object ID item has an initial value.

Examples

- Search SR Source Object Code – Initial Value: `EXPENSEREPORT`

- Search SR Source Object I' – Initial Value:
  `WebExpensesAM.ExpenseReportHeadersVO.ReportHeaderId`

Personalizing the Return Page of iSupport pages:

To specify the appropriate return page of the iSupport pages for creating service requests and viewing service requests, provide initial values using personalization for either of the following items:

- Return to Page (Format: FND_FUNCTION)

- Return to Page for a Particular Object ID (Format: FND_FUNCTION?ObjectID=)

  The first item, Return to Page (Format: FND_FUNCTION), accepts only an FND_FUNCTION value.

The second item, Return to Page for a Particular Object ID (Format: FND_FUNCTION?ObjectID=), accepts an FND_FUNCTION with an additional object ID parameter. If you provide a value to the second item, then you must specify an object ID for both Create SR Source Object ID and Search SR Source Object ID. See examples above for details on these items. The shared SR bin automatically appends the object ID to the value of the second item, and the object ID will be passed to the appropriate iSupport pages as its full return URL

> **Note:** If both items have values, then the second item, Return to Page for a Particular Object ID (Format: FND_FUNCTION?ObjectID=), takes precedence over the first item, Return to Page (Format: FND_FUNCTION).

If you need the object ID to be encrypted for your return page, then specify this by providing an initial value of Y for the Encrypt Object ID item.

Examples
- Return to Page (Format: FND_FUNCTION) – Initial Value: `OIEMAINPAGE`

- Return to Page for a particular Object ID (Format: FND_FUNCTION?ObjectID=) – Initial Value: `OIECONFIRMPAGE?dbiReportHeaderId=`

- Encrypt Object ID (Y/N) – Initial Value: `Y`

Opening iSupport Pages in a New Window

Suppose that you want to open iSupport pages in a new window, for example, when creating a service request or viewing service request details. To do so, personalize and provide an initial value of Y for the Open iSupport Pages In New Window item.

Example
- Open iSupport Pages In New Window – Initial Value: `Y`

8

Using Oracle iSupport

This chapter covers the following topics:

- Overview
- User Interface Basics
- Performing Searches
- Using Quick Find
- Searching Account Information
- Searching Oracle Install Base
- Searching Forums
- Searching and Browsing the Knowledge Base
- Viewing Top Solutions from Oracle Knowledge Management
- Choosing Home Page Content
- Enabling Home Page E-mail Subscriptions
- Using the Bookmarked Solutions Quick Links Bin
- Using Service Requests
- Using Accounts
- Viewing Contracts
- Viewing Returns
- Viewing Repair Orders
- Using Returns
- Using Oracle Install Base
- Viewing Oracle Install Base
- Editing a Product in Oracle Install Base
- Adding Products to Oracle Install Base

- Using Saved Searches

- Defining Saved Search Criteria

- Viewing Categories

- Posting New Messages to Forums

- Subscribing to Forums

- Setting Forums Signature

- Changing User Profile Information

- Changing/Resetting Password

- Adding to or Changing Contact Points (Phone/Email/Fax)

- Setting Display Preferences

- Changing Default Customer Account

Overview

This section provides process-oriented, task-based procedures for using Oracle iSupport. This section covers general user navigation and page functionality and explains how to use the fields and other relevant elements within the pages.

For conceptual information regarding the application, please see the Overview chapter (PDF version) of this guide.

For task-based administrator procedures necessary for ongoing application maintenance, please see the Administering Oracle iSupport (online help) or chapter (PDF version) of this guide.

For setup information regarding the application, please see the setup chapters of this guide. The guide is released PDF, with the most recent version at My Oracle Support (http://support.oracle.com). Please visit the Oracle Technology Network (http://otn.oracle.com/documentation) to order printed copies of the guides.

User Interface Basics

This section provides basic user interface (UI) concepts.

- **Configurability -** Because the user interface of Oracle iSupport is highly configurable, you may or may not see what is described in this guide. Configurability affects both the application content pages that Oracle delivers and local pages that your support group can attach to application pages. Examples of the first category are pages, regions, buttons, and fields on application pages that are visible to different types of users. For example, the pages for the flow to create service requests are all configurable in this way. Examples of the second category are advertisement sections that are attached to the top, left, right, and bottom of application pages. Your system administrator, application administrator, and end

users control what is appropriate to display to particular users.

- **Go Button** -The Go button next to certain text boxes allows you to access a list of values (LOV) associated with that field. It is used to select items to enter into the text box. After the LOV pops up, select the entry of your choice using the radio button. On most LOVs you need to select Submit for the text box to be populated.

- **Drop-List -** A box with a down arrow next to it indicates that you select an entry from a drop-down list. Select the down arrow and make your selection with the mouse.

- **Required Fields -** An asterisk next to any field indicates that the entry is mandatory.

- **Calendar Icon -** The Calendar icon is used to set start or end dates for applicable procedures. Select the icon to view a calendar, then select a date to populate appropriate field.

- **Using the Tabs -** The business user interface has five main tabs, each with its own set of subtabs:

  - **Home -** This tab accesses the home page for the application. Your personalized home page consists of bins containing links to frequently used information that you set up (such as tracked Service Requests), and items supplied by the application administrator, such as links to Technical Library documents or Support links. The home page has no subtabs.

  - **Account** - The Account tab gives users access to transactions information, such as order details, invoices, payments, returns, contracts, shipments, and products in Oracle Install Base. Account tab subtabs are: Orders, Invoices, Payments, Contracts, Returns, and Products. See Using Accounts, page 8-10 for more information.

  - **Support** - By accessing the Support tab, users can create and track service request information, search the knowledge base, request call-backs from support agents, and access online forums. Support tab subtabs are: Ask Me, Technical Library, Forum, View/Update Request, and Create Request.

    Note: Employee Users see only the Home and Support tabs.

Performing Searches

This topic group provides instructions for performing searches within the application. Topics include:

- Using Quick Find

- Searching Accounts/Transactional Inquiries

- Searching Oracle Install Base

- Searching Forums

- Searching the MES Technical Library

- Searching and Browsing the Knowledge Base

- Viewing Top Solutions from Oracle Knowledge Management

Using Quick Find

Quick Find is the drop-down list displayed beneath the subtabs on all of the main application pages. To use Quick Find, select the appropriate item from the drop-down list, enter search criteria in the text field, and select Go.

Note: You may use the % character as a wildcard when searching.

Quick Find can help you locate:

Service Requests - Use the exact Service Request number; partial numerical values are not supported. To search by service request summary field, enter partial values, using the % sign as a wildcard. For example, t%% will find all service requests whose summary field begins with T.

Solutions - Enter partial or complete search criteria to find solutions in the knowledge base. For example, if you know the number of a solution in the database, enter it in the text box. Or, enter a partial alphabetical value, using the % sign as a wildcard, to find text entries.

Library - Enter partial or complete search criteria to locate documents in Marketing Encyclopedia System (MES)/Technical Library. Enter a partial alphabetical value, using the % sign as a wildcard, to find entries.

Forums - Search within Forums postings by entering full or partial values in the field. Enter a partial alphabetical value, using the % sign as a wildcard, to find forum entries. Forums also has an advanced search feature.

Install Base - Enter known criteria to find products in Oracle Install Base. Oracle Install Base also has its own search feature. See Using Oracle Install Base, page 8-14 for more information.

Searching Account Information

The search function within the Account tab of Oracle iSupport allows you to search your orders, invoices, payments, contracts data, returns, products, and repair orders.

To search for data within the Account tab, use the following procedure:

Steps

1. Within Oracle iSupport, navigate to the Account tab.

2. Select one of the following subtabs: Orders, Invoices, Payments, Contracts, Returns, or Products.

3. Select an account number to search within. Account numbers are assigned when your username is created within the system.

4. In the Search drop-down list, select a search criteria, for example, *order number*.

5. In the constraint operator drop-down list, select a criteria, for example, *greater than*.

6. In the field, enter search information that corresponds to the search criteria chosen in the drop-down list.

7. Select Go to perform the search.

Searching Oracle Install Base

Please see the topic Using Saved Searches for information on searching Oracle Install Base, page 8-16.

Searching Forums

Follow the guidelines below to use the Forums search function.

1. Within Oracle iSupport, navigate to Support > Forum > Advanced Search. The Advanced Search - Forum page appears.

2. Enter data in any one or all of the following fields:

   Message Number - This is the system-generated message number.

   Subject Keyword(s) - Enter (case insensitive) keywords that may be in the message headers (subject) of the appropriate messages. You can enter more than one word in this field, using the % sign as a wildcard, but your *search criteria must match the exact order of the wording* found in the subject field.

Example: You are having a problem closing your CD-ROM tray and wish to search for messages that relate to this subject. In this example, there is a message with the subject, Unable to close CD-ROM tray. If you enter `unable%CD` in the search field, it will find the message. But, if you enter `CD%unable`, the system will not find the message because the search criteria is not in the exact order of the information from the subject field.

Message Keyword(s) - Enter (case-insensitive) keywords that may be in the bodies of applicable messages. You can enter as many words as you like, and there is no need to use a plus sign (+) here, although you can use it you like. Also, the words do not need to be in any particular order.

Category - Leave the drop-down list set to All to search all categories, or restrict the search to a particular category by choosing the category from the list.

Forum - Leave the drop-down list set to All to search all forums, or restrict the search to a particular forum by choosing the forum from the list.

Posted Between - Use the calendar icon to the right of the first field to select a date to begin searching from, and use the calendar icon to the right of the second field to select an end date.

Author - Select the Myself radio button to find messages posted by you. To find messages written by others, select the Others radio button and enter the name of the author of the message. Use the format <first name> <space> <last name>.

Message Status - Choose from the radio buttons: Read searches only messages that have been viewed by a user. Unread searches only messages that have not been viewed by a user. All searches both types.

3. Select Search. The application returns a list of messages matching your search criteria. If no messages are found, the system returns the message: `No messages were found to match the search criteria.`

Forum Search Results

Forum search results are organized into a table with the following columns:

Subject Name -Message header or subject.

Author - Name of the person who posted the message.

Date - Date that the message was posted.

To view a message in the results list, select the hyperlink in the Subject Name column. You are now be able to reply to the message or start a new message thread within the forum.

To begin a new search, select the Search Again button and follow the steps above in Searching Forums.

Searching and Browsing the Knowledge Base

Use this procedure to search and browse the knowledge base.

Steps

1. Within Oracle iSupport, navigate to Support > Ask Me.

   The Knowledge Base page appears.

2. In the Search region, use the Search and Product fields and the solution category buttons to qualify your search. Click Go.

3. To perform an advanced search, click Solution Advanced Search.

4. To browse a category and/or document, select the appropriate link in the Solution Categories region.

Viewing Top Solutions from Oracle Knowledge Management

The top problem solutions on the Other Recommended Solutions page are frequently used solutions and recommended solutions from Oracle Knowledge Management. Recommended solutions are those that knowledge workers recommend for users to review. For more information on searching the knowledge base, see the *Oracle Knowledge Management User Guide*. Use this procedure to view top problem solutions from Oracle Knowledge Management.

Steps

1. Within Oracle iSupport, navigate to Support > Top Solutions.

   The Other Recommended Solutions page appears.

2. In the Frequently Used Solutions region, use the View Solutions Used LOV to define the time period used in the region for this search.

3. In both regions, click the description links to drill down to detail that is presented on the solution detail page.

   This page provides access to more information about symptoms, causes, actions, and attachments.

4. Click available links or the View icons to obtain more details.

Choosing Home Page Content

A variety of content can be added to your home page. Some content is configured by the application administrator to appear mandatorily on your home page. Other content can be selected - and its layout chosen - by you.

Follow the steps below to select the content for your home page.

1. Within Oracle iSupport, navigate to Home > Personalize: Content. A list of content choices appears.

2. Choose topics from the Optional Content list by selecting in the check box next to the content topic. Wide (W) content can only be displayed in a wide column; narrow (N) content can be displayed in either size column. A wide column is twice as wide as a narrow column.

3. After making your selections, select Update to save changes.

4. Return to the home page to verify that you can see the content.

Using the Edit Hyperlinks on Home Page Bins

Certain bins on your home page are editable, meaning you can choose which data items appear in them. For example, for a Service Request Quick Links bin, you can select which fields to appear in the bin, such as service request number, submit date, and service request status. Bins that are editable/configurable by the user have an Edit hyperlink at the top of the bin.

Using the Close Hyperlinks on Home Page Bins

You can also close certain bins on your home page simply by clicking the Close hyperlink at the top of the bin.

Related topic:

Tracking Service Requests on the Home Page

Enabling Home Page E-mail Subscriptions

Oracle iSupport allows users to receive the contents of their home page in an e-mail. This is useful when users are unable to log in to Oracle iSupport for whatever reason. This feature can be enabled by either the user himself or an administrator. Follow the steps below to enable or disable this feature.

Prerequisite

A valid e-mail account has been recorded for the user who will receive the home page

e-mails (see Adding/Changing Contact Points, page 9-6).

Steps

1. With Oracle iSupport, select the Profile button at the top of the page. The Personal Profile page appears.

2. In the menu to the left, select Support. The Support page appears.

3. In the Email Subscription: Email Content area, a list of available home page content appears. From the list, select the desired home page content.

4. In the Email Delivery Preferences region, choose the delivery frequency and the delivery language.

5. Select Save. The application returns a confirmation message.

Using the Bookmarked Solutions Quick Links Bin

Knowledge base results can be bookmarked and organized into a bin on your home page by utilizing the Add to Quick Links button on applicable pages.

• To view one of the bookmarked items, select the underlined hyperlink of the item.

• To remove a quick link from the bin, select the Edit hyperlink on the bin itself, and then select the remove icon next to the appropriate quick link.

Use the following procedure to change the display properties of the bin.

Steps

1. Within Oracle iSupport, navigate to the home page. Select the Edit link on the Bookmarked Solutions Quick Links bin (not the Service Request Quick Links bin). The Edit Quick Link Content page appears.

2. Choose whether the name, description, or both name and description appear in the bin. In the Display Options area, select:

   • **Quick Link Name** - Activate this check box to display the name of the quick link in the bin. In the bin, quick link name shows up under the Quick Link column. The Quick Link Name is generated by the application when you bookmark an item.

   • **Quick Link Description** - Activate this check box to display the descriptive text name of the quick link in the bin. In the bin, the quick link description shows up under the Description column. The Quick Link Description is generated by the application when you bookmark an item.

3. Choose how the content is sorted. In the Sort Options area:

- **Sorted By LOV** - Select the primary sort criteria, either Name or Description. If you select Name, the system will sort all content items by name. If you select Description, the system will sort all content items by the description. The Ascending/Descending choice tells the system to sort - alphabetically or numerically - the name or description either first-to-last or last-to-first.

- **Then By LOV** - Select the secondary sort criteria. The criteria chosen in the Sorted By LOV will take precedence over any sort criteria chosen here.

4. Enter the number of rows to appear in the Number of Rows Displayed text box.

5. Select Save to save changes.

Using Service Requests

Because the service request pages and the flow to create service requests are highly configurable, your administrator determines the appearance and online help content for the pages involved. Typical topics include the following:

- Creating Service Requests

- Using Service Request Profiles

- Using Service Request Saved Views

- Changing Service Request Status

For implementation information on the configuration of service request pages and the flow to create service requests, see Configuring Service Request Pages, page 4-13 of the *Oracle iSupport Implementation and User Guide*.

Using Accounts

This topic group provides information on how to access to account information, such as orders, invoices, payments, contracts, and shipments. For information on Returns, see Using Returns , page 8-13.

Topics include:

- Viewing Orders

- Viewing Invoices

- Viewing Payments

- Viewing Contracts

- Viewing Returns

- Viewing Repair Orders

Viewing Contracts

Follow the procedure below to access your contracts information.

Steps

1. Within Oracle iSupport, navigate to Account > Contracts.

    The Contracts page appears and shows a list of contracts.

2. Select a Contract Number hyperlink to view the Contract Overview page for that contract.

3. Select Back to return to the Contracts page.

Searching Contracts

To search for contracts, use the following procedure.

Steps

1. Within Oracle iSupport, navigate to Account > Contracts.

    The Contracts page appears and shows a list of contracts.

2. Select Advanced Search.

    The Advanced Search page appears.

3. Use the LOVs, flashlight icon search aids, and other fields to define your search criteria for the desired contracts.

4. Define your desired display and sort options.

5. Select Search.

    The results appear in the Search Results region.

Viewing Returns

Use this procedure to search returns.

Steps

1. Within Oracle iSupport, navigate to Account > Returns.

   The Returns summary page appears. By default, this page shows your returns sorted by creation date with the most recent date first.

2. Qualify your search by selecting values for the Returns in Last, Returns Between, and Search By fields. To search returns by date, either use the calendar icon or enter dates manually in the format 15-NOV-2003.

3. In the All Returns region, click a return number to see details for the return on the Returns Details page.

4. From that page, click Item Details to see details of a return order line.

Viewing Repair Orders

You can view the repair status for an item that was delivered to a service organization to repair, either paid or as supported by a service agreement. Follow this procedure to view repair orders.

Steps

1. Within Oracle iSupport, navigate to Account > Repair Orders.

   The Repair Order Summary page appears. By default, this page shows your repair orders sorted by creation date with the most recent date first.

2. To view the details of a repair order, click its number in the Repair Order Number column.

3. To view a saved personalized search, choose your search name from the Saved Search LOV, and click Go.

4. To view the details of a service request that is associated with a repair order, click the service request number in the Service Request Number column.

5. To define a personalized search, click Personalize.

   The Search Repair Orders page appears.

   1. Use the Searches region to run or remove a saved search.

   2. Use the Search Attributes region to define, save, and run a new search.

Using Returns

Oracle iSupport allows you to create return material authorizations (RMAs), or returns. In order for you to create a return for an item, an order first must have been booked in Oracle Order Management. For more information, see:

- *Oracle Order Management User's Guide*

- *Oracle Order Management Implementation Guide*

Follow this procedure to create a return.

Prerequisite

An order has been booked in Oracle Order Management.

Steps:

1. Within Oracle iSupport, navigate to Account > Returns > Return Items link.

   The Create Return: Search and Select Items page appears.

2. Search for an item to return by selecting a part number, order number, or serial number and clicking Go. You can also search for items by multiple part numbers and order numbers by separating query criteria with space example (AS54888 AS32111) or by a Serial Number. The application shows order items with exact match of the query criteria. Wild-card characters such as "*" and "%" are not supported.

   The Results region displays the results of the search.

3. Select the check box for any item that you want to return, and click Add to Return.

   The Create Return: Review and Submit page appears and shows the proposed items for the return order.

4. In the Returned Quantity column, enter the quantity to be returned for the corresponding line items.

5. Use the Return Reason LOV to enter the corresponding reason for the return of each item.

6. Click the Billing icon to view and change the billing information for an item.

7. When you are satisfied the selection on the Create Return: Review and Submit page, click Submit Return.

   A confirmation page appears and shows a return order number.

Using Oracle Install Base

Oracle Install Base is a repository of product information, location, status, party relationships, configuration, ownership, accounts, and change history for a customer product, an asset, or a software license. It offers life-cycle tracking of an item from the time that it is received, in inventory, in WIP, in projects, at customer sites, or during repair. Oracle Install Base also records a history of changes to tracked items and does so independently of their ownership, physical location, or accounting classification.

Definition: An instance in Oracle Install Base is an occurrence of an item entity. For example, an manufacturer has a part number for a TV he makes, each time he sells one TV, an occurrence of this part number is recorded in Oracle Install Base.

Oracle Install Base is specifically designed to track serialized and non-serialized item instances for the following:

- Tangible products

- Tangible assets

- Software

- Communications and utility services

All Oracle Install Base functionality in Oracle iSupport is contained on the Products tab in the interface for a general user.

Oracle iSupport allows you to view and search Oracle Install Base, as well as add products to it. This topic area includes:

- Viewing Oracle Install Base, page 8-14

- Editing a Product in Oracle Install Base, page 8-15

- Adding Products to Oracle Install Base, page 8-15

- Using Saved Searches, page 8-16

- Defining Saved Search Criteria, page 8-17

Viewing Oracle Install Base

Follow the procedure below to view product information in Oracle Install Base.

Steps

1. Within Oracle iSupport, navigate to Account > Products.

The Search Products page appears with a list of products in Oracle Install Base.

2. To view details of a product, select the hyperlink for the product or use the View Details LOV for it.

For more information, see the *Oracle Install Base User Guide*.

Editing a Product in Oracle Install Base

Here are steps for editing a product in Oracle Install Base.

Steps

1. Within Oracle iSupport, navigate to Account > Products.

2. In the Search Products page, a list of products in your install base appears. Select the appropriate hyperlink in the Description column.

3. In the Product Details page, make changes as desired. See Adding Products to Oracle Install Base, page 8-15 for more information on the fields on the Product Details page.

4. Select Save.

5. Respond to the confirmation message.

For more information, please see the *Oracle Install Base User Guide*.

Adding Products to Oracle Install Base

In the Create Product page you can create a product, or item instance. The page has regions for general item information, owner information, current location, item flags, and item views.

Use the following procedure to create a product.

Prerequisites

The item and item number for an item instance (product) must already be defined in the Inventory Item Master as Install Base trackable.

Steps

1. Within Oracle iSupport, navigate to Account > Products.

2. Select Create. The Create Product page appears.

3. In each region, enter data in the fields. Fields marked with an asterisk (*) are required.

   Note: Many fields within this page are followed by a Go button. The button indicates that you can enter a generic search value using `%` in the associated fields and then select Go to display a list of values that satisfy the generic criteria. When you select one of these results, it populates the associated field.

   Select the calendar icon to help you enter dates.

   Under Item Flags, *sellable* means orderable and reflects selecting the Orderable flag in the item master setup. The Merchant flag is automatically selected if an agent creates or changes the instance. The Customer flag is automatically selected if a customer creates or changes the instance.

   As necessary, select Clear to clear out your test entries, and re-enter your values.

4. If your definition is complete, optionally select Creation Completed.

   Doing so means that it can be used for configuration and other applications.

5. Select Submit.

   The Product Details page appears for your product with its new product (instance) number. If you provided values for all the required fields (with asterisks) but did not select Creation Completed, then the application selects it for you. If an instance is created without the mandatory fields, then Creation Completed is not selected. This means that the instance cannot be used in applications such as Service Request.

6. Select Submit to save changes.

   For more information, please see the *Oracle Install Base User Guide*.

Using Saved Searches

Oracle iSupport allows you to save searches in Oracle Install Base. With saved searches you can easily reuse a set of possibly complicated search criteria by assigning a name to the saved set of criteria. Use this procedure to display the results of a previously named set of search criteria.

Steps

1. Within Oracle iSupport, navigate to Products. The Search Products page displays a list of products in your Oracle Install Base.

2. In the Saved Searches LOV, select the name of the predefined search that you want to use. See Defining Saved Search Criteria, page 8-17 for more information on how to set up a saved search.

3. Select Go. The search results appear in the lower part of the page.

4. As desired, select the link for an item description to display details about it.

For more information, see the *Oracle Install Base User Guide*.

Defining Saved Search Criteria

With saved searches you can easily reuse a set of possibly complicated search criteria by assigning a name to the saved set of criteria. Most of this defining process occurs on the Advanced Product Search page. This page is organized by regions of basic categories under which you can define and test various specific search criteria. After you are satisfied with intermediate or final results of your tests, then you can save the set of criteria with a name of your choice. The basic category regions are:

*   General Attributes

*   Current Location

*   Party Accounts

*   Other Information

*   Table Personalization (defines the position of displayed columns)

Most fields within the regions are followed by a Go button. The button indicates that you can enter a generic search value using % in the associated fields and then select Go to display a list of values that satisfy the generic criteria. When you select one of these results, it populates the associated field.

Use this procedure to define a named set of search criteria.

Steps

1. Within Oracle iSupport, navigate to Account > Products. The Search Products page displays a list of products in your install base.

2. Select Personalize. The Advanced Product Search page appears.

3. In each basic category region, enter data in the fields.

    As necessary, use generic entries and the associated Go button to populate fields with specific values.

    Select the calendar icon to help you enter dates.

    As necessary, select Clear to clear out your test entries, and re-enter values.

4. In the Table Personalization region, use the Move and Remove commands and arrows to move selected columns between the list of available columns and columns that you select for display.

5. Use the arrows in the right-hand column of the personalization table to arrange the display sequence of your selected columns. The column titles as arranged from top to bottom are displayed from left to right on the Search My Products page.

6. As appropriate select one of the following:

   Search: Finds values that satisfy the current search criteria

   Enter a name before selecting one of these two options:

   Save: Saves the search criteria under the most recently used name for search criteria

   Save and Apply Search: Saves the search criteria under the most recently used name for search criteria and then performs a search that uses those criteria

Viewing Categories

Forums are organized into larger groups called categories. Follow the steps below to view category listings.

Steps

1. Within Oracle iSupport, navigate to the Support > Forum tab. The Category Listing window appears.

2. Use the View By drop-down list box to display either a list of categories containing Forums that you have subscribed to, or a list of all categories.

3. Categories containing forums show a plus sign (+) in the adjacent column. To expand the category listing and show the available forums, select the plus-sign next to the category name.

   Optionally, select Expand All to display all forums within all listed categories.

   Optionally, select Collapse All to display only the category names.

Posting New Messages to Forums

Follow the steps below to post a new message to a forum.

Steps

1. Within Oracle iSupport, navigate to the Support > Forum tab. The Category Listing window appears.

2. In the category list, categories containing forums show a plus sign (+) in the adjacent column. To expand the category listing and show the available forums,

select the plus-sign next to the category name.

3.   Forums names will appear as hyperlinks. Select a link to enter a forum.

4.   Select New Thread.

5.   Fill in the Subject name and type your message.

6.   Select Post. Your message will be stored underneath the forum.

Note: Any information you have entered in the User Signature text box in the General Preferences area will appear when you post to Forums (see Setting Forums Signature, page 8-19).

Subscribing to Forums

Oracle iSupport gives you the option of listing on your forums page a set group of forums, presumably the ones you access most often and/or are most interested. This functionality is known as Subscribing to a Forum. Directions for enabling this feature are shown below.

Steps

1.   Within Oracle iSupport, navigate to the Support > Forum tab.

2.   Enter a forum using the procedure detailed in Viewing Forums.

3.   Select Subscribe. When you access the main Forums page, you will have the option displaying only the forums to which you have subscribed

Unsubscribing to Forums

Use the following procedure to unsubscribe to Forums to which you have subscribed.

Steps

1.   Within Oracle iSupport, navigate to the Support > Forum tab.

2.   Enter a forum using the procedure detailed in Viewing Forums.

3.   Select Unsubscribe.

Setting Forums Signature

Use the following procedure to set the signature that appears when you post messages to forums.

Steps

1. Within Oracle iSupport, navigate to the Profile button at the top of the page. The Personal Profile page.

2. From the Personal Profile page, select the Support link in the side navigation menu.

3. In the User Signature text box, enter the desired information.

4. Select Update to save changes.

Changing User Profile Information

This section provides information on changing user profile data, including:

- Changing/Resetting Password, page 9-5

- Adding/Changing Contact Points (Phone/Email/Fax), page 9-6

- Setting General Preferences, page 9-8

- Changing Default Responsibility, page 9-9

- Changing Default Customer Account, page 9-10

Changing/Resetting Password

Follow the steps below to change or reset a password.

Steps

1. Within Oracle iSupport, select the Profile button at the top of the page. The Personal Profile page appears.

   Note: If you are an administrator performing this task, search for the user and then select the underlined hyperlink of the username to access the Personal Profile page for that user.

2. If the service organization has not turned on single sign-on, then do the following:

   1. In the Personal Profile page, enter the new password in the New Password and Re-enter New Password fields.

   2. Select Update to save the changes.

3. If the service organization has turned on single sign-on, then you may see a link

called Change Password instead of the New Password and Re-enter New Password fields. If so, then click the link and follow the instructions on the target page.

Adding to or Changing Contact Points (Phone/Email/Fax)

Add to or change contact points of users (such as phone, email, fax) by following the steps below.

Steps

1. Within Oracle iSupport, navigate to the Profile button at the top of the page. The Personal Profile page appears.

    Note: If you are an administrator performing this task, search for the user and then select the underlined hyperlink of the username to access the Personal Profile page for that user.

2. From the Personal Profile page, select the Contact Points hyperlink from the User Profile region of the side navigation menu.

    To edit an existing contact point, select the underlined hyperlink of the appropriate contact point.

    To create a new contact point, select Create.

3. Make additions/alterations to the following:

    - **Communication Type** - Enter the type of communication; examples are email, phone, telex.

    - Delivery Method

    - Primary Contact Point

4. Save the changes by selecting Save.

Setting Display Preferences

Display preferences include default style sheet, language, currency, and date format.

Follow the steps below to change general preferences.

Steps

1. Within Oracle iSupport, click the Profile button at the top of the page. The Personal Profile page appears.

2. Select the Display Preferences hyperlink. The Display Preferences page appears.

   For instructions on how to change default responsibilities, see Changing Default Responsibility, page 9-9.

3. In the General Display area, set the following as desired:

   - **Display Style** - Select a default style sheet.

   - **Language** - Select a default language.

   - **User Currency** - Select a default currency.

   - **Date Format** - Select a date format to use when entering dates.

     RRRR = year

     DD = day

     MM or MON = month

4. In the Table Display area, set the following as desired:

   - **Display Rows per Page** - Select the number of rows to appear of any tables that are displayed within the application.

   - **Display Blank Rows per Table** - Select the number of blank rows to appear in any updateable tables that are used by the application.

5. Select Update to save changes.

Changing Default Customer Account

Use the following procedure to change the default account number.

Steps

1. Within Oracle iSupport, click Profile button. The Personal Profile page appears.

   Administrator Note: If you are an administrator performing this task, search for the user and then select the username to access the user's Personal Profile page.

2. Select the Accounts hyperlink. The Accounts page appears.

3. Select the radio button next to the desired account.

4. Save the changes by selecting Save.

9

Administering Oracle iSupport

This chapter covers the following topics:

- Maintaining Users
- Creating Users
- Deleting Users
- Setting Effective Dates for Users
- Searching for Users
- Changing User Profile Information
- Changing/Resetting Password
- Adding/Changing Contact Points (Phone/E-mail/Fax)
- Adding/Changing Address Information
- Setting General Preferences
- Changing Default Responsibility
- Changing Default Customer Account
- Setting User Homepage E-mail Subscription
- Setting User Signature for Forums
- Adding/Changing Company Information
- Viewing Administrators Information
- Mapping Technical Library Categories
- Maintaining the Home Page
- Maintaining Service Request Templates
- Creating New Templates
- Defining Template Parameters
- Defining Template Questions and Answers

- Setting Severity Thresholds for Templates

- Setting the Default Template

- Using the Save Template Feature to Create New Templates

- Renaming Existing Templates

- Disabling Templates

- Configuring Surveys

- Setting Up Oracle Scripting

- Creating Surveys in Oracle Scripting

- Assigning Survey Administrator Responsibility

- Setting Up Oracle iSupport Survey in iSurvey

- Making Surveys Available in Oracle iSupport

- Viewing Survey Results

- Configuring Call Me (Web Call Back)

- Administering Forums

- Maintaining Categories

- Maintaining Forums

- Maintaining Messages

Maintaining Users

For current information on user implementation, user roles, user responsibilities, and seeded user types, see the *Oracle E-Business Suite CRM System Administrator's Guide*.

This section includes:

- Creating Users, page 9-3

- Deleting Users, page 9-3

- Setting Effective Dates for Users, page 9-3

- Searching for Users, page 9-4

Related topics:

- User Management, page 1-12

- Changing User Profile Information, page 9-5

Creating Users

For directions on how to set up users, see the current setup information in Setting Up Oracle iSupport Users, page 3-12.

Deleting Users

Use the steps below to delete users from the application.

Steps

1. Log into the Applications login page as Oracle iSupport Administrator or Primary User.

2. Navigate to Administration > User.

3. Find the user whom you wish to delete. See Searching for Users, page 9-4 for information on finding users.

4. Select the underlined hyperlink of the appropriate username. The Personal Profile page appears.

5. In the Personal Profile page, enter an end date for the user. The username associated with the user will expire on the date you enter.

6. Select Update. The application returns a confirmation message.

Setting Effective Dates for Users

Use the steps below to change the effective dates for users of the application.

Steps

1. Log into the Applications login page as Oracle iSupport Administrator or Primary User.

2. Navigate to Administration > User.

3. Find the user whose information you wish to change. See Searching for Users, page 9-4 for information on finding users.

4. Select the underlined hyperlink of the appropriate username. The Personal Profile page appears.

5. In the Personal Profile page, enter a start date or end date for the user. The

username associated with the user will be activated on the start date that you enter. The username associated with the user will expire on the end date you enter.

6. Select Update. The application returns a confirmation message.

Searching for Users

The user search function allows you to search for users by First Name, Last Name, or Username. Use the following procedure to search for users.

Steps

1. Login to the Applications login as Oracle iSupport Administrator or Primary User.

2. Navigate to Administration > User.

3. In the Find User drop-down list, select username, last name or first name.

4. In the field, enter your search string. Use the percent sign (%) as a wildcard(s). You can use as many wildcards as you like, but you must enter at least three characters. See examples below.

   Note: To find all users, use three percent signs in row (%%%) as the search string.

5. Select Go.

6. The application returns a list of users based on your search criteria.

   Example 1:

   Search for all users whose username begins with B:

   1. Select Username from the drop-down list.

   2. Enter in the field: B%%.

   3. Select Go.

      Example 2:

      Search for all users whose last name contains an X:

   4. Select Last Name from the drop-down list.

   5. Enter in the field: %X%.

   6. Select Go.

      Example 3:

Search for all users whose first name ends in ON:

7. Select First Name from the drop-down list.

8. Enter in the field: %ON.

9. Select Go.

Changing User Profile Information

This section provides information on changing user profile data, including:

- Changing/Resetting Password, page 9-5

- Adding/Changing Contact Points (Phone/Email/Fax), page 9-6

- Adding/Changing Address Information, page 9-7

- Setting General Preferences, page 9-8

- Changing Default Responsibility, page 9-9

- Changing Default Customer Account, page 9-10

- Setting up Home Page E-mail Subscription, page 9-11

- Setting User Signature for Forums, page 9-12

- Adding/Changing Company Information, page 9-12

- Viewing Administrator Information, page 9-13

Changing/Resetting Password

Follow the steps below to change or reset a password.

Note: These steps are for administrative users of the application.

Steps

1. Log into the Applications login page as Oracle iSupport Administrator or Primary User.

2. Navigate to Administration > User.

3. Find the user whose information you wish to change. See Searching for Users, page

9-4 for information on finding users.

4. Select the underlined hyperlink of the appropriate username. The Personal Profile page appears.

5. In the Personal Profile page, enter the new password in the New Password and Re-enter New Password fields.

6. Select Update. The application returns a confirmation message.

Adding/Changing Contact Points (Phone/E-mail/Fax)

Add to or change contact points (such as phone, e-mail, fax) by following the steps below.

Note: These steps are for administrative users of the application.

Steps

1. Log into the Applications login page as Oracle iSupport Administrator or Primary User.

2. Navigate to Administration > User.

3. Find the user whose information you wish to change. See Searching for Users, page 9-4 for information on finding users.

4. Select the underlined hyperlink of the appropriate username. The Personal Profile page appears.

5. Under the User Profile area, select Contact Points. The Contact Points of User page appears.

6. To edit an existing contact point, select the underlined hyperlink of the appropriate contact point.

7. To create a new contact point, select Create.

8. You can make additions/alterations to the following:

   • **Communication Type** - Select the method of communication; examples are email, phone, fax.

   • **Phone Line Type** - Select from the drop-down list the type of phone line, if appropriate. Examples are office, home, mobile.

   • **Phone Country Code** - Optionally enter the phone country code.

- **Phone Area Code** - Enter phone area code.

- **Phone Number** - Enter the phone number, without the area code.

- **Primary Contact** check box - If this is to be the preferred method of contact, activate this box.

> **Note: Note:** There can be a primary contact point for each communication type. For example, here can be a primary e-mail address and a primary phone number.

9. When finished making changes, select Save. The application returns a confirmation message.

> **Note:** You can view the active and inactive contacts in the Status column.

Adding/Changing Address Information

Address information for users can be changed by either the users themselves or the administrator users (ibu admin or primary user).

To change company information for a group of users, see Adding/Changing Company Information, page 9-12.

Steps

1. Log into the Applications login page as Oracle iSupport Administrator or Primary User.

2. Navigate to Administration > User.

3. Find the user whose information you wish to change. See Searching for Users, page 9-4 for information on finding users.

4. Select the underlined hyperlink of the appropriate username. The Personal Profile page appears.

5. Under the User Profile area, select Addresses.

6. To edit an existing address, select the Update icon for the appropriate address. To create a new address, select Create.

7. Make desired changes to the following:

- **Country** - This is the country that relates to the Address field. Using the Address flex field supported by Oracle Receivables, the Country LOV supplies an appropriate international address format. Thus the specific address fields displayed depend on the country chosen.

  The application checks if an address style is associated with the country itself. If no style is found, then the profile option Service: Default Address Style is checked. If still no style is found, then the application uses the default address style AS_DEFAULT provided by Oracle Receivables. A user's operating unit and the Oracle Receivables system properties determine the default country. The profile option MO: Operating Unit determines the operating unit.

- **Address Type** - Select the type of address, such as Bill to, Ship to, and Sold-to.

  The iSupport Customer Address Type lookup determines the content of the list in the Address Type column.

- **Address 1** - This is the first line of the address that appears on an envelope or mailing label. You can use this line for primary address information, such as street address, post office box, or apartment number.

- **Address 2** - This is the second line of the address that appears on an envelope or mailing label. You can use this line for secondary or non-critical information, such as a building name or number.

- **City** - This is the city that relates to the Address field.

- **State** - This is the state that relates to the Address field.

- **Postal Code** - This is the postal code or zipcode that relates to the Address field.

- **Primary Address** check box - Select this box if this is the preferred address to use for this user.

      > **Note: Note:** A primary address can exist for each address type. For example, there can be a primary bill to and a primary ship to address.

8. Select Save. The application returns a confirmation message.

Setting General Preferences

Follow the steps below to change general user preferences for the application, such as default language, currency, and date formats.

Note: The steps below are for administrator users.

Steps

1. Login to the Applications login as Oracle iSupport Administrator or Primary User.

2. Navigate to Administration > User.

3. Search for the user whose information you wish to alter. See Searching for Users, page 9-4 for directions.

4. Select the underlined hyperlink of the appropriate username. The Personal Profile page appears.

5. Navigate to Preferences. The General Preferences page appears.

6. In the General Display area, set the following as desired:

   - **Display Style** - Select a default style sheet.

   - **Language** - Select a default language.

   - **User Currency** - Select a default currency.

   - **Date Format** - Select a date format to use when entering dates.

7. In the Table Display area, set the following as desired:

   - **Display Rows per Page** - Select the number of rows to display of any tables that are used by the application.

   - **Display Blank Rows per Table** - Select the number of blank rows to display in any updateable tables that are used by the application.

8. Select Update to save your changes.

Changing Default Responsibility

Responsibilities define application privileges, controlling the presentation of menus, tabs, and screens. For more information, see User Management, page 1-12.

> **Note:** The default responsibility that is active at the time that a user logs in to the Applications login determines which application is initially accessed.

> **Note:** These steps are for administrative users of the application.

Steps

1. Log in to the Applications login as the Oracle iSupport Administrator or Primary User.

2. Navigate to Administration > User.

3. Search for the user whose information you wish to alter. See Searching for Users, page 9-4 for directions.

4. Select the underlined hyperlink of the appropriate username. The Personal Profile page appears.

5. Select the Responsibilities link at the bottom of the page. The Responsibilities page appears.

6. If the desired responsibility is already apparent, select the radio button next to the default responsibility you wish to assign.

7. If the responsibility you wish to assign as the default is not already on the page:

    1. Select the underlined word, `Select`, to bring up the Responsibility search page.

    2. Select the desired responsibility from the search results, and the Responsibilities page will re-appear with the new responsibility listed.

    3. You can then select the Default radio button next to the responsibility.

8. Select Save in the Responsibilities page to save changes.

Changing Default Customer Account

Use the following procedure to change the default customer account that appears when a user initially logs in.

Note: These steps are for administrative users of the application.

Steps

1. Log in to the Applications login as Oracle iSupport Administrator or Primary User.

2. Navigate to Administration > User.

3. Search for the user whose information you wish to alter. See Searching for Users, page 9-4 for directions.

4. Select the underlined hyperlink of the appropriate username. The Personal Profile page appears.

5. Navigate to the Accounts link. The Accounts page appears.

6. Select the check box next to the desired default account.

7. Select Save. The application returns a confirmation message.

Setting User Homepage E-mail Subscription

Oracle iSupport allows users to receive the contents of their home page in an e-mail. This is useful when users are unable to log in to Oracle iSupport for whatever reason. This feature can be enabled by either the user himself or an administrator. Follow the administrator steps below to enable or disable this feature.

Prerequisites

- A valid e-mail account has been recorded for the user who will receive the home page e-mails (see Adding/Changing Contact Points, page 9-6).

- Oracle Workflow has been set up and configured.

- To populate the tables required for this process, run the concurrent programs Notification Mailer and IBU_PRODUCT_EMGEN.

Steps

1. Login to the Applications login as Oracle iSupport Administrator or Primary User.

2. Navigate to Administration > User.

3. Search for the user whose information you wish to alter. See Searching for Users, page 9-4 for directions.

4. Select the underlined hyperlink of the username. The Personal Profile page appears.

5. In the menu to the left, select Support. The Support page appears.

6. In the Email Management: Subscription Content area, a list of available home page content appears. From the list, select the desired home page content.

7. In the Delivery Frequency region, choose the desired frequency for e-mails.

8. From the Email Delivery Language LOV, select a language.

9. In the Contact Point region, select either HTML or Text as the type of e-mail.

10. Select Update Subscriptions. The application returns a confirmation message.

Setting User Signature for Forums

The forums signature is the text that appears automatically when a user posts a message to a forum. Use the following steps to alter or add the Forums signature for a user.

Note: The steps in this section are administrator steps.

Steps

1. Login to the Applications login as Oracle iSupport Administrator.

2. Navigate to Administration > User.

3. Search for the user whose information you wish to alter. See Searching for Users, page 9-4 for directions.

4. Select the underlined hyperlink of the username. The Personal Profile page appears.

5. In the menu to the left, select Support. The Support page appears.

6. In the User Signature for Forums field, enter any text that you wish to display at the end of this user's forums postings.

7. Select Update. The application returns a confirmation message.

Adding/Changing Company Information

Modify company information by following the steps below. A user must be classified as a B2B (business user) user for company information to display.

> **Note: Note**: When you update company information for any user of a company, the company information for all users associated with this company also changes.

Steps

1. Log in to the Applications login as Oracle iSupport Administrator or Primary User.

2. Navigate to Administration > User.

3. Search for a user within the company whose information you wish to alter. See

Searching for Users, page 9-4 for directions.

4. Select the underlined hyperlink of the username. The Personal Profile page appears.

5. From the Company Profile menu on the left, select Information. The Company Information page appears.

6. In the Company Information page, you can make changes to the following:

   - **Internal/External** radio buttons - Select whether this company is an internal or external company.

   - **Name of company** - Enter or change the name of the company.

   - **SIC** - Select the flashlight icon to select from a LOV of Standard Industrial Codes or North American Industrial Classification System (NAICS).

   - **Duns Number** - Record the DUNS number. The Dun & Bradstreet D-U-N-S Number is a unique nine-digit identification code, which is used to reference single business entities, while linking corporate family groups together.

   - **Number of Employees** - Record the number of employees of the company.

   - **Customer Since** - Record the date the company first became a customer.

   - **Current Revenue** - Record the company's current revenue.

   - **Projected Revenue** - Record the company's projected revenue.

   - **Analysis Year** - Record the year the revenue was analyzed.

   - **Fiscal Year End** - Record the date of the company's fiscal year end.

   - **Fiscal Code** - Record the fiscal code of the company.

   - **Tax Reference Number** - Record the tax reference number of the company.

7. Select Update to save changes.

Viewing Administrators Information

Use the steps below to view a list of administrators for the application. Generally, these are users who are Oracle iSupport Administrators or Primary Users.

Steps

1. Log in to the Applications login as Oracle iSupport Administrator.

2. Navigate to Administration. Select the Profile button at the top of the page.

3. Under Company Information on the left, select Administrators. A list of application administrators appears. For B2B users, the administrators are the primary users for the organization to which the B2B user belongs.

4. To view available contact information, select the username hyperlink of the administrator.

Mapping Technical Library Categories

You can display different Technical Library content to different sets of users like business users, individual users, employees, and guest users. This is achieved by associating a top-level category for Technical Library with multiple responsibilities and displaying to users the MES category linked to the responsibility with which they are currently logged in. With the Category Administration setup page you can select an MES category and assign it to a responsibility. The Technical Library page and the technical library bin then show the category that corresponds to the current responsibility of a user. Use this procedure to make the association.

Steps:

1. Log in to the Applications login as Oracle iSupport Administrator.

2. Navigate to Administration > Support > Technical Library. The Category Administration page appears.

3. Use the Category LOV to associate a responsibility name with a category. A category can be associated with multiple responsibilities.

4. Select Update to save your assignments.

Maintaining the Home Page

This section provides information on the following tasks:

• Using the Homepage administration pages

• Enabling Home Page E-mails

In the Homepage administration pages you can view all the contents defined for the home page and perform the following actions:

• Design home page content and layout

• Edit content properties

- Add content

- Add MES content

- Delete content

For details on these topics, refer to Setting Up Oracle iSupport Homepage, page 3-32.

Maintaining Service Request Templates

Service Request templates provide a structured, formatted method of gathering information during Service Request creation.

Oracle TeleService, which now includes what was previously known as Oracle Support, provides the bulk of service request functionality in Oracle iSupport. For any service request functionality in Oracle iSupport, you must do a full installation of Oracle TeleService/Support.

For more information on Oracle TeleService, see the latest versions of the following documentation:

- *Oracle TeleService Implementation and User Guide*

- Section Service Requests, page 1-4 in this guide

- Integrating Oracle iSupport with Service Request chapter of this guide

This topic area includes:

- Creating New Templates, page 9-15

- Defining Template Parameters, page 9-16

- Defining Questions/Answers on Templates, page 9-18

- Setting Severity Thresholds for Templates, page 9-19

- Setting the Default Template, page 9-21

- Using the Save Template Feature, page 9-21

- Renaming Existing Templates, page 9-22

- Disabling Templates, page 9-22

Creating New Templates

Use the steps below to begin creating a new service request template.

Prerequisites

None

Steps

1. Log in to the Applications login asOracle iSupportAdministrator.

2. Navigate to Administration > Support > Request Template.

3. Select Create Template.

4. In the Name field, enter a meaningful name for the new template.

5. Optionally, select the calendar icon next to the Effective Start Date field and choose an effective start date for the template. Do the same for Effective End Date.

   Note: It is recommended that you use the Effective End Date function to disable existing templates as opposed to deleting them.

6. Select Continue.

7. Select Update.

8. Select Back.

9. Select the hyperlink of the template name and continue creating the template by:

   • Defining Template Parameters, page 9-16

   • Defining Questions/Answers on Templates, page 9-18

   • Setting Severity Thresholds for Templates, page 9-19

Defining Template Parameters

You can associate products, urgencies, problem codes, and requests as parameters for a service request template. Use the steps below to associate these parameters with a template.

Prerequisites

   • Oracle Support has been installed and configured. See the *Oracle TeleService Implementation and User Guide* for details.

   • A service request template has been created in Oracle iSupport.

- Products have been set up in Oracle Inventory.

Steps

1. Log in to the Applications login asOracle iSupportAdministrator.

2. Navigate to Administration > Support > Request Template. The Service Request Template page appears with a list of templates.

3. Select the underlined hyperlink of the appropriate template. The Template Details page appears.

4. In the Template Information region, select Template Parameters. The Template Parameters page appears.

5. In the Products region, select Add Products. The Available Products page appears.

6. Select the Add check box for each associated product that you want to add, and select Add. The page refreshes itself without the added products.

7. Select Back. The Template Parameters page appears showing the added products.

8. In the Urgencies region, select Add Urgencies. The Available Urgencies page appears.

9. Select the Add check box for each associated urgency that you want to add, and select Add. The page refreshes itself without the added urgencies.

10. Select Back. The Template Parameters page appears showing the added urgencies.

11. In the Problem Codes region, select Add Problem Codes. The Available Problem page appears.

12. Select the Add check box for each associated problem that you want to add, and select Add. The page refreshes itself without the added problems.

13. Select Back. The Template Parameters page appears showing the added problems.

14. In the Request Types region, select Add Request Types. The Available Request page appears.

15. Select the Add check box for each associated request that you want to add, and select Add. The page refreshes itself without the added requests.

16. Select Back. The Template Parameters page appears showing the added requests.

Defining Template Questions and Answers

Use the steps below to define questions and answers for a template.

Prerequisites

- Oracle Support has been installed and configured. See the *Oracle TeleService Implementation and User Guide* for details.

- A service request template has been created in Oracle iSupport.

Steps

1. Log in to the Applications login asOracle iSupportAdministrator.

2. Navigate to Administration > Support > Request Template. The Service Request Template page appears with a list of templates.

3. Select the underlined hyperlink of the appropriate template.

   The Template Details page for the template appears. The Template Details region lists any questions associated with the template. If none is associated, then an empty list appears.

4. In the Template Details region, select one of these two options:

   - Create Individual Note for Each Question

   - Create a Single Note for all the Questions

     Creating an individual note for each question has the advantage that the application can pass responses to Knowledge Management that have meaningful search criteria.

5. Select Add Question. The Define Question and Answer page appears.

6. In the Question region, enter a question for the template in the empty Question text box.

7. Select Answer Type: You have two options for answer types:

   - **Choice** - This is a pick-list type answer and can be used in scoring. Scoring is used for determining the severity of the service request.

   - **Free Text** - This is a free-form answer. You can specify the number of lines allowed for the answer (see below). This answer cannot be used in scoring.

8. Select Continue. The application updates the page.

9. To enforce that the user is required to answer the question, select Yes in the Response Required field. Mandatory questions force the user to provide an answer before the application will continue creating the request. To make the question optional for the end user, select No.

10. If your question requires a choice-type answer, then select (yes/no) whether you want the answer to be used in the severity scoring (see Set Severity Thresholds below). If you choose yes, then answers to the question will be weighted from 0 through 10 during the answer setup (see Set up Answers for a Choice Question below).

11. In the Answer region, enter an answer for the question in an empty Value text box. The answers you set up here become an LOV for the end user, and the answer you select as a default will appear as the default answer on the user side.

12. For each choice-type answer, set a score of 0 through 10.

    After the end user answers the questions, the application will add up these values, and the final score will be used to determine the severity of the service request, based on the severity thresholds you set (see Defining Severity Thresholds, below).

13. Select Add. The choice is added to the list of answers.

14. To sort the answers, select Sort and use the up and down arrows in the Sort Answers page to arrange the questions in the desired order for the LOV. Select Update.

15. Select Back to return to the Define Question and Answer page.

16. For text-type questions, you do not need to determine answers. Instead, in the Answer region, select the number of rows that the user is limited to when typing in the answer.

17. Select Back. The Template Details page appears.

18. To sort the questions, select Sort and use the up and down arrows in the Sort Questions page to arrange the questions in the desired order. Select Back to return to the Template Details page.

19. To edit a question, select the hyperlink of the question that you wish to modify.

Setting Severity Thresholds for Templates

Use the following procedure to define severity thresholds for a template.

Prerequisites

- Oracle Support has been installed and configured, including the setup of severities. See the *Oracle TeleService Implementation and User Guide* for details.

- A service request template has been created in Oracle iSupport.

For more information, see:

- *Oracle iSupport Implementation and Administration Guide*: *Integrating Oracle iSupport with Service Request*

- Oracle TeleService documentation and courseware

Steps

1. Log in to the Applications login asthe Oracle iSupport Administrator.

2. Navigate to Administration > Support > Request Template. The Service Request Template page appears with a list of templates.

3. Select the underlined hyperlink of the appropriate template. The Template Details page appears.

4. Use the Set Severity region to set severity thresholds for the template. The names of the severities listed on this page (for example, high, medium, and low) come from the severity setups in Oracle TeleService.

   The application determines the sum score from all of the scorable answers assigned to answers in the Defining Template Questions and Answers, page 9-18 section and compares it to the total possible. The application then determines the difference as a percentage and assigns the appropriate threshold. See the example below for clarification.

   You do not need to define thresholds for all of your severities, only the ones you wish to use. You can select one of the severities as a default and all templates will use that severity. The application ignores severities for which you do not define thresholds.

   Sample scenario related to this setup

   You have defined a new template with two questions on it. Each question has three possible answers, for a total of six answers defined by the administrator and two possible answers for the user. The user can select only one answer per question.

   In this example, you have set up each of the question's three answers with identical scores: 1, 4, and 5. Because the user can select only one answer per question, the highest possible score in this scenario is 10 (The highest score for each question is 5, and 5 plus 5 is 10). The user cannot see these scores.

The user selects an answer from the first question with a score of 1. He selects an answer from the second question with a score of 4. Thus, the total of the two answers is 5. The application find the score of 5 and compares it against the total possible answer points, which in this case is 10. From there, the application formulates a percentage of answers scored (5) verses a total possible score (10). The percentage in this case is 50%. Then, based on the severity thresholds you set (see the example below), the application determines the severity, such as high, medium, or low. Here are the thresholds set for this example:

High - Start Threshold = 61%; End Threshold = 100%

Medium - Start Threshold = 31%; End Threshold = 60%

Low - Start Threshold = 0%; End Threshold = 30%

5. When you have finished entering severity thresholds, select Update.

Setting the Default Template

Oracle iSupport uses the Default Template that you set up when users select a parameter combination for which a template does not exist.

Only one default template is allowed.

Prerequisites

- Oracle Support has been installed and configured. See the *Oracle TeleService Implementation and User Guide* for details.

- A Service Request template has been created in Oracle iSupport.

Steps

1. Set up a new template with general questions. The questions should be "catch all" type questions related to service requests. Use the following procedure to set the default template.

2. In the list of templates, in the Set as Default column, select the radio button next to the appropriate template.

3. Select Update.

Using the Save Template Feature to Create New Templates

The Save Template feature of service request templates is helpful when you already have a template set up and wish to use it as a model or prototype when creating a new template. Use the following procedure to use the Save Template feature.

Steps

1. At the Applications login, log in as the Oracle iSupport Administrator.

2. Navigate to Administration > Support > Request Template. The Service Request Template page appears with a list of templates.

3. Select the underlined hyperlink of the model template. The Template Details page appears.

4. In the Save Template region, enter a value for New Template Name.

5. Select Save Template.

6. Select Back. The Service Request Template page appears and shows the new template in the list of templates.

7. Edit the template as desired.

Renaming Existing Templates

Follow the steps below to rename a service request template.

Steps

1. At the Applications login, log in as Oracle iSupport Administrator.

2. Navigate to Administration > Support > Request Template.

3. Select a template. The Template Details page appears.

4. In the Name field, enter the new name for the template.

5. Select Update.

Disabling Templates

Follow these steps to disable a template.

Steps

1. Log in to the Applications login asOracle iSupportAdministrator.

2. Navigate to Administration > Support > Request Template. The Service Request Template page appears with a list of templates.

3. Select the underlined hyperlink of the template that you want to delete or disable. The Template Details page appears.

4. Select the calendar icon next to the Effective End Date field and choose an effective end date for the template.

   It is recommended that you end-date a template to disable it, rather than remove it by using the Remove check box on the Service Request Template page.

5. Select Update to save changes.

Configuring Surveys

The Surveys functionality of Oracle iSupport allows you to survey user groups on topics of your choice. Surveys require you to set up Oracle Scripting. Follow the steps below to implement Surveys.

Setting Up Oracle Scripting

Oracle Scripting presents scripted messages that guide interaction center agents through their interactions with customers. It has a survey component called iSurvey. Through the Scripting iSurvey component, enterprises can create, manage, and report on surveys to evaluate customer satisfaction, gain customer input on new initiatives, and gain other feedback from survey respondents. Oracle Scripting is one application module of Oracle's Interaction Center suite of applications.

Oracle Scripting consists of 3 components:

- Scripting Engine - The simple graphical user interface that displays a script at an agent's workstation via a browser or within an Oracle Form.

- Scripting Author - A script and survey development studio which is downloaded to a user's workstation. Scripting Author uses visual layouts to allow a script developer to create, modify, and deploy scripts for agents at the interaction center.

- Survey Component - An HTML user interface providing web-based surveys that can be deployed on the Internet, via email messages or direct links on enterprise web sites. The survey component contains all the tools needed to manage lists, set up survey campaigns, and provide result information.

Set up Oracle Scripting according to the *Oracle Scripting Implementation Guide*.

Creating Surveys in Oracle Scripting

Oracle iSupport uses only the non-list-based types of surveys.

Create scripts in Oracle Scripting according to the steps and guidelines documented in

the *Oracle Scripting Implementation Guide* and *Oracle Scripting User Guide*.

Assigning Survey Administrator Responsibility

Assign the responsibility, Survey Administrator, to either an existing Oracle iSupport user (such as the Oracle iSupport Administrator), or to a special user created just for this purpose. See the Setting up the Oracle iSupport Users topic in the *Implementation Tasks* chapter of the *Oracle iSupport Implementation and Administration Guide* for details on how to set up users.

Steps

1. Log into Oracle iSupport as the Oracle iSupport Administrator.

2. Select Administration > User. The All Users page appears.

3. Search for the user who will be the Survey Administrator, whether this is you as the Oracle iSupport Administrator or another user. Select the underlined hyperlink of the username.

4. In the User Details page, select Responsibilities.

5. In the Responsibilities page, select the underlined hyperlink of the word Select. A list of responsibilities appears. If necessary, search for the Survey Administrator responsibility. After you have found it, select the Survey Administrator responsibility.

   Do not set the Survey Administrator responsibility as the default unless you wish to force the user to log into iSurvey the next time the user logs in to the HTML Applications login.

6. Save your work.

Setting Up Oracle iSupport Survey in iSurvey

Surveys have three parts:

- **Header** - this is the header area of the survey

- **Error** - this is the error page that is displayed when an error occurs during the survey

- **Final** - this is the final page displayed to the user after the survey is complete

All of these parts you create as JSPs in the steps outlined in this section.

Follow the steps below to set up Surveys in the Oracle iSurvey module.

Steps

1. Log in to the Applications login page as the user with Survey Administrator responsibility.

   If you are already in Oracle iSupport, then you can change current responsibility: Navigate to Profile > Preferences and select the Survey Administrator responsibility from the Current Responsibility LOV on the General Preferences page. Select Update.

2. Navigate to Survey Campaign > Survey Resources. In the Resources page, select Create.

3. In the Create Resource page, create a Header page, a Final page, and an Error page according to the steps and guidelines documented in the *Oracle Scripting User Guide*, with the following exception:

   • Be sure to enter ibupfbgl.jsp in the File Name field for the Final page file. This is the Oracle iSupport JSP that lists the surveys that you set up.

4. Navigate to Survey Campaign > Survey Campaign. Select the Create button.

5. In the Create Survey page, select the appropriate script using the Go button and the % as a wildcard.

6. Continue creating the survey by following the steps and guidelines documented in the *Oracle Scripting User Guide*, with the following exception:

   • For the Final page field, using the Go button, select the resource, Oracle iSupport JSP (ibupfbgl.jsp), created in step 3 above.

7. Select Create to save the survey.

8. Navigate to Survey Campaign > Cycle and set up a cycle to associate with the survey by following the steps and guidelines documented in the *Oracle Scripting User Guide*.

9. Navigate to Survey Campaign > Deployment and create a deployment for the survey by following the steps and guidelines documented in the *Oracle Scripting User Guide*.

10. Deploy the survey by clicking the Deploy button. Oracle iSupport displays only surveys that have the status of Active and whose dates fall within current dates. See the *Oracle Scripting User Guide* for additional information.

Making Surveys Available in Oracle iSupport

After you have created the survey in iSurvey, you need to select it in Oracle iSupport and then associate a usergroup(s) with the survey. Follow the steps below to activate the survey in Oracle iSupport. This section contains three parts:

• Set up usergroup.

• Run Usergroup Creation concurrent program.

• Select the survey and usergroup in Oracle iSupport.

Set Up a Usergroup

Follow the steps below to set up a usergroup to associate with any surveys that you have created in iSurvey. Only the usernames that are associated with the usergroup(s) selected will be able to view the surveys that you have created.

Steps

1. Log in to the Applications login page as the Oracle iSupport Administrator.

2. Navigate to Administration > Support > Usergroup > Create.

    The User Group Detail page appears.

3. Enter a unique name for the usergroup in the Name field.

4. Select a effective date for the usergroup using the Start Date calendar icon.

5. Select an ending date for the usergroup using the End Date calendar icon.

    You can also end date a usergroup to disable it.

6. Enter a brief description for the usergroup in the Description text field.

7. In the SQL statement field, enter an appropriate SQL statement.

    Sample SQL Usergroup Select Statement

    ```
    select EMPLOYEE_ID from FND_USER where EMPLOYEE_ID > 0
    ```

    This select statement retrieves all employee IDs greater than zero (that is, all employees) from the fnd_user table.

    Note: Usergroup select statements support PARTY_ID and EMPLOYEE_ID, but not USER_ID.

8. Select Save.

Run Usergroup Creation Concurrent Program

To populate necessary tables in the database, run the concurrent program Usergroup Creation Program, whose short name is IBUUG. This concurrent program must be run each time that you update or add users to a usergroup.

Select Survey and Usergroup to Associate with Survey

Use the following steps to associate the usergroups with surveys that you have created in iSurvey. Only members of the usergroups are able to view and respond to surveys.

Steps

1. Log into Oracle iSupport as the Oracle iSupport Administrator.

2. Navigate to Administration > Support > Survey.

   The Survey Administration page appears with a list of selected survey deployment names and rows with blank fields for adding names.

3. To select a new survey deployment name, select the flashlight icon in a blank row to open a page with which you can pick a survey deployment name.

   After making your selection, you are returned to the Survey Administration page, and the new survey deployment name appears in the formerly blank row.

4. To associate a user group with a survey deployment, select the Associate link for that survey deployment name.

   The User Groups Associated with the Survey Deployment page appears with a list of associated groups and rows with blank fields for adding groups.

5. To add another user group name to the list of names, select the flashlight icon in a blank row to open the Search User Group page.

6. Use the page to search for a subset of user group names, and then select from the resulting set of displayed names.

   After making your selection, you are returned to the User Groups Associated with the Survey Deployment page, and the new user group name appears in the formerly blank row.

7. Select any user group that you want to remove from the association by selecting its Remove check box.

8. Select Save to make your changes to the list of user group names.

9. Select Back to return to the Survey Administration page.

10. Select any survey deployment name that you want to remove from the page by selecting its Remove check box.

11. Select Save to save your changes.

12. To respond to a created survey, log into Oracle iSupport as a member of a user group associated with a survey, and navigate to Support > Survey.

Viewing Survey Results

iSurvey allows you to view the results of your surveys. The following steps can assist you in retrieving survey results. For complete information, refer to the *Oracle Scripting Implementation Guide* and the *Oracle Scripting User Guide*.

Steps

1. Log in to iSurvey as a user with Survey Administrator responsibility.

   From Oracle iSupport, to switch current responsibility, select the Profile > Preferences menu to switch current responsibility to the Survey Administrator responsibility. Select the Update button to save changes.

2. In iSurvey, navigate to Response > Survey Campaign.

   The Survey Campaign Responses page appears.

3. Follow the steps and guidelines documented in the *Oracle Scripting User Guide* to view and manage your survey results.

Configuring Call Me (Web Call Back)

The Web Call-Back (Call Me) feature allows users to submit a call-back request in Oracle iSupport. The web call-back requires implementation of the following:

- Oracle Interaction Center (formerly Call Center Technology - CCT) suite

- Oracle Universal Work Queue (UWQ)

- Oracle Customer Care portion of Oracle TeleService

- Oracle CRM Foundation, Notes module

The purchase of call center hardware also is required.

This section provides an overview of the call-back functionality in Oracle iSupport. For more information, refer to the Oracle Interaction Center documentation.

Outside of Oracle iSupport, the call routing process is essentially this: After a user

makes a call-back entry, Oracle iSupport sends the request to the CCT server group specified by the Oracle iSupport Administrator on the Oracle iSupport page. The CCT applications and hardware route the request to the UWQ server. The UWQ server decodes the customer information (the Notes module captures comments from the user) and assigns it to the UWQ client, and the call request immediately pops up in an agent's page in Oracle Customer Care.

There are very few setups required in Oracle iSupport after the dependencies listed above are installed and functioning properly. Oracle iSupport simply calls one of the CCT APIs to provide the list of available call center server groups that appear in the Oracle iSupport UI.

Refer to Oracle CRM Interaction Center documentation for information on setting up the underlying products that enable the Web Call-Back functionality in Oracle iSupport.

After the CCT and UWQ applications and call center hardware are installed and implemented, you can use the steps below to set up Call Me in Oracle iSupport.

Steps:

1. Log into Oracle iSupport as the Oracle iSupport Administrator.

2. Navigate to Administration > Support > Call Me.

   The Call Me Administration page appears.

3. Select a call center server group from the LOV.

4. Select a default note type from the LOV.

5. Select Update to save the data.

Administering Forums

Forums are interactive online discussion areas available to users. Forums are made up of categories containing forums or topic areas.

This following ongoing activities in this section are also setup activities:

- Creating Categories

- Creating Forums

- Restricting Access to Categories or Forums

- Using Forum Moderators

For details, refer to Setting Up Oracle iSupport Forums, page 3-37.

This section also includes the following topics:

- Maintaining Categories, page 9-30

- Maintaining Forums, page 9-31

- Maintaining Messages, page 9-34

Maintaining Categories

This section contains information on the following tasks:

- Deleting Categories, page 9-30

- Renaming Categories, page 9-30

For information on restricting access to categories (changing the status to restrict), see Restricting Access to Categories or Forums, page 3-39.

Deleting Categories

Use the steps below to delete a category. When you delete a category that has subcategories and/or forums within it, all of the associated subcategories/forums will also be deleted.

Steps

1. Log in to the Applications login page as the Oracle iSupport Administrator.

2. Navigate to Administration > Forum > Category > Delete. The Remove Category page appears.

3. In the Choose a category to remove drop-down box, select the appropriate category.

4. Select Ok. Respond to the confirmation message.

Renaming Categories

Use the steps below to rename a category.

Steps

1. Log in to the Applications login page as the Oracle iSupport Administrator.

2. Navigate to Administration > Forum > Category > Rename. The Rename Category page appears.

3. Select the category to rename from the drop-down list.

4. Type the new name in the Enter the new name of the category field.

5. Select Modify. Respond to the confirmation message.

Maintaining Forums

This section includes instructions for common forum maintenance tasks performed by the Oracle iSupport Administrator, including:

- Deleting Forums, page 9-31

- Renaming Forums, page 9-31

- Moving Forums, page 9-32

- Modifying Forum Attributes, page 9-32

For information on restricting access to forums (changing status to restrict), see Restricting Access to Categories or Forums, page 3-39.

Deleting Forums

Use the steps below to delete a forum.

Steps

1. Log in to the Applications login page as the Oracle iSupport Administrator.

2. Navigate to Administration > Forum > Forum > Delete. The Remove Forum page appears.

3. Select the forum to delete from the drop-down list.

4. Select Remove. Respond to the confirmation message.

Renaming Forums

Use the steps below to rename a forum.

Steps

1. Log in to the Applications login page as the Oracle iSupport Administrator.

2. Navigate to Administration > Forum > Forum > Rename. The Rename Forum page appears.

3. In the Choose a forum to rename drop-down box, select the appropriate forum.

4. Type a new name in the Enter new forum name text box.

5. Select Modify. Respond to the confirmation message.

Moving Forums

Use the steps below to move a forum from its current category to another category.

Steps

1. At the Applications login, log in as the Oracle iSupport Administrator or Forum Moderator.

2. Navigate to Administration > Forum > Forum > Move. The Move Forum page appears.

3. From the Choose a forum to move drop-down box, select the appropriate forum.

4. Select a destination category from the Choose its destination Category drop-down box.

5. Select Move. Respond to the confirmation message.

Modifying Forum Attributes

The administrator may add, modify or delete attributes to a forum in order to increase the organizational and searching capacities of the forum. This section includes:

- Add New Attribute, page 9-32

- Modify Existing Attribute, page 9-33

- Delete Attribute, page 9-33

Add New Attribute

Follow these steps to add an attribute.

Steps

1. At the Applications login, log in as the Oracle iSupport Administrator.

2. Navigate to Administration > Forum > Forum > Modify Attributes. The Modify Forum Attributes page appears.

3. Select the appropriate forum from the drop-down list.

4. Select Next. The Modify Forum Attribute page reappears. Under Attribute List,

select Add New Attribute. The Add Forum Attributes page appears.

5. Enter the name of the new attribute in the Header Name field.

6. Activate the Mandatory check box only if you want to require users to fill in an attribute when posting to the forum.

7. Enter the value of the attribute in the Header Value field. The optional header value field will become the default value for this attribute.

8. Select Save. Respond to the confirmation message.

Modify Existing Attribute

Follow these steps to modify an existing forum attribute.

Steps

1. At the Applications login, log in as the Oracle iSupport Administrator.

2. Navigate to Administration > Forum > Forum > Modify Attributes. The Modify Forum Attributes page appears.

3. Select the forum whose attribute you wish to modify from the drop-down list.

4. Select Next. The Modify Forum Attribute page reappears.

5. Select the Edit underlined link next to the appropriate attribute.

6. Enter a new name in the Header Name field.

7. Activate the Mandatory check box only if you want to require users to fill in an attribute when posting to the forum.

8. Enter the value of the attribute in the Header Value field. The optional header value field will become the default value for this attribute.

9. Select Save. Respond to the confirmation message.

Delete Attribute

Follow these steps to delete an attribute.

Steps

1. At the Applications login, log in as the Oracle iSupport Administrator.

2. Navigate to Administration > Forum > Forum > Modify Attributes. The Modify

Forum Attributes page appears.

3. Choose the forum whose attribute you wish to delete from the drop-down list.

4. Select Next. The Modify Forum Attribute page reappears.

5. Select the Delete underlined link next to the appropriate attribute.

6. Respond to the confirmation message.

Maintaining Messages

This section includes information on the following forum moderator and/or application administrator tasks:

- Deleting Messages, page 9-34

- Moving Messages, page 9-35

- Changing the Active Status of Message Threads, page 9-35

- Changing the Distribution Status of Message Threads, page 9-36

Deleting Messages

Use the steps below to delete messages or message threads (groups of messages).

Steps

1. At the Applications login, log in as the Oracle iSupport Administrator or Forum Moderator.

2. Navigate to Administration > Forum > Messages.

   The Message Management page appears.

3. From the drop-down list, select the forum that contains message to be deleted.

4. Select Next.

   The Message Management page displays a list of all messages in the forum, the dates they were posted, and the authors' names.

5. To expand all threads, select Expand All. To collapse all threads, select Collapse All.

6. To delete a message, select the check box next to the message and then select Delete.

7. To delete a message thread, select all of the messages in the thread and then select

Delete.

Moving Messages

Use the steps below to move messages from one forum to another forum.

Steps

1. At the Applications login, log in as the Oracle iSupport Administrator.

2. Navigate to Administration > Forum > Messages.

   The Message Management page appears.

3. From the drop-down list, select the forum that contains message to be moved.

4. Select Next.

   The Message Management page appears with a list of all messages, the dates they were posted. and the authors' names.

5. To expand all threads, select Expand All. To collapse all threads, select Collapse All.

6. To move a message, select the check box next to the message you wish to move and then select Move.

7. To move a message thread, select all of the messages in the thread and then select Move.

8. From the drop-down list, select the destination forum for the message and select Ok.

9. A confirmation page appears.

Changing the Active Status of a Message Thread

Use the steps below to change the active status of a message thread.

Steps

1. At the Applications login, log in as the Oracle iSupport Administrator or Forum Moderator.

2. Navigate to Administration > Forum > Messages.

   The Message Management page appears.

3. From the drop-down list, select the appropriate forum.

4. Select Next.

   The Message Management page appears with a list of all messages, the dates they were posted, and the authors' names.

5. In the Active Status column, select either Open or Close from the drop-down list.

   Close status disables the message(s).

Changing the Distribution of a Message Thread

Use the steps below to change the distribution status of a message thread.

Steps

1. At the Applications login, log in as the Oracle iSupport Administrator or Forum Moderator.

2. Navigate to Administration > Forum > Messages.

   The Message Management page appears.

3. From the drop-down list, select the appropriate forum.

4. Select Next.

   The Message Management page appears with a list of all messages, the dates they were posted and the authors' names.

5. In the Distribution Column, select either Public or Internal from the drop-down list.

   Public - All categories of users can see and reply to the message thread.

   Internal - Only employees of the merchant and the application administrator (or forum moderator) can see and reply to the message thread.

6. Select Save.

10

Overview of Oracle Marketing Encyclopedia System

This chapter covers the following topics:

- Introduction
- Planning your Implementation
- Prerequisites for Accessing MES
- Understanding the Access Manager
- Setting up the Privileges
- Understanding the Group Manager
- Creating a Group
- Setting up Privilege for the Whole Group
- Understanding the Channel Manager
- Setting up Access for a Channel
- Setting up Channel Access for the User
- Setting up Channel Access for a Group
- Categories and Category Hierarchy
- Creating Categories
- Setting Up a Category Hierarchy
- Creating Content Types
- Creating Perspectives
- Creating Channels
- Publishing to Categories or Groups
- Administering MES

- Setting up Territories

- Setting up Workflow Time Out

- Changing the Default Values for Workflow Time Out

- Setting up Proxy Information

- Setting up Concurrent Jobs

- Concurrent Programs as a Part of a Standard Request

- Scheduling Concurrent Programs

- Guidelines

Introduction

Oracle Marketing Encyclopedia System (MES) is a content repository management component of the CRM suite of applications that allows you to create, publish, and manage content. It also allows you to organize content in different hierarchies.

Hierarchy of categories and channels are the means to store, organize, and distribute different types of content items in the MES repository.

A hierarchy can have unlimited levels of categories. Channels are the lowest level in the hierarchy of categories that contain published items.

Access to the MES repository is controlled through the Access Manager. The MES administrator can set up access privileges for users. MES also has a concept of groups to which access privileges can be setup. An administrator can define different groups and associate users to these groups.

Depending on your access privileges, you can create categories or channels, publish items, and approve publishing items to a particular channel.

Planning your Implementation

Before publishing content items and viewing these items in the MES repository, an administrator has to understand and complete the following steps:

- Prerequisites for Accessing MES, page 10-3

- Setting up the Privileges, page 10-4

- Creating a Group, page 10-4

- Setting up Privilege For the Whole Group, page 10-5

- Setting up Access for a Channel, page 10-6

- Setting up Channel Access for the User , page 10-6

- Setting up Channel Access for a Group, page 10-7

- Categories and Category Hierarchy , page 10-7

- Creating Content Types , page 10-8

- Creating Perspectives , page 10-9

- Creating Channels, page 10-9

- Setting up Territories, page 10-10

- Setting up Workflow Time Out, page 10-11

- Setting up Proxy Information, page 10-12

- Setting up Concurrent Jobs, page 10-12

Prerequisites for Accessing MES

MES is embedded as a part of other CRM applications. MES is not a stand alone application. See the documentation of the particular application that MES is embedded in for more information about accessing MES from that application.

> **Note:** The user logging into MES has to be associated with a resource.

Understanding the Access Manager

At the center of the MES application is the Access Manager. It is used to:

- Create and maintain groups (Group Manager)

- Assign user and group privileges (Privilege Manager)

- Give channel access privileges (Channel Manager) for every user that needs to access MES

Understanding the Privilege Manager

The MES administrator can assign privileges to users or groups of users depending on the operations that the users or groups would be performing.

Setting up the Privileges

Use this procedure to set up privileges for an MES user. When users log on, they will be able to perform only those operations specified by the administrator.

Steps:

1. Log on to a specific application.

2. Navigate to MES > Administration > Privilege. The Privilege Manager screen appears.

3. Query the user or the group that you want to give access to. Give the user or group the desired privilege(s). The privileges that the administrator can assign are:

   • Administrative privileges

   • Publishing content

   • Approving content

   • Setting up a Channel (Create, Update, Delete, View Channel)

   • Setting up a Category (Create, Update, Delete, View Category)

   • Publishing to a Territory.

Understanding the Group Manager

A group comprises of one or more users. A published document or a message may be distributed to many users. Additionally, groups may contain different types of users, that is, users who have different levels of security or privileges.

Creating a Group

Use this procedure to create a group for a MES user.

Steps:

1. Log on to a specific application.

2. Navigate to MES > Administration > Group.

3. Add a group by entering a group name

4. Click Update.

5. Click View Member List

   The Edit Group Members for <Group Name> screen appears.

6. You can either query the users that are a part of this group or add new group members.

Setting up Privilege for the Whole Group

The MES administrator can setup common privileges for all the users in a particular group.

Steps:

1. Log on to a specific application

2. Navigate to MES > Administration > Group.

3. Query the group that you want to assign the privilege to.

4. Give the group the desired privilege. The privileges that an administrator can assign are:.

   • Administrative

   • Publishing Content

   • Approving Content

   • Setting up a Channel (Create, Update, Delete, Channel)

   • Setting up a Category (Create, Update, Delete, Category)

   • Publishing to a Territory

   Note: When a group is created through the MES user interface, a group channel is implicitly created for it with the same group name. Users can publish to a group, by publishing to a group channel. Since multiple users can be associated to a group, this is a means of distributing documents to more than one user. If a group is created externally, for example, through a Resource Manager, no group channel is automatically created.

Understanding the Channel Manager

The MES administrator may create channels and control the access over these channels. Channels have View, Update, and Delete privileges. An administrator can assign these privileges to either a channel, a user, or a group.

Setting up Access for a Channel

Use this procedure to set up access for a channel.

Steps:

1. Log on to a specific application.

2. Navigate to MES > Administration > Channel Access. The Channel Access Manager screen appears.

3. If you know the channel name, enter it and click **Setup Access for This Channel** button or leave it blank and click **Setup Access for This Channel** button. A list of all the channels in the system appears.

4. Select a channel name from the list and click **Setup Access for Channel** button.

5. Query the user or the group to whom you want to give privilege for this channel.

6. Give the group or user the desired privilege. The privileges that an administrator can assign are:

   • Delete: delete this channel

   • Update: update contents of this channel

   • View: view the channel

   • Approve content: approve content for this channel

Setting up Channel Access for the User

Use this procedure to set up channel access for the user.

1. Log on to a specific application.

2. Navigate to MES > Administration > Channel Access.

3. If you know the user name, enter it and click **Setup Access for this User** button or

leave it blank and click **Setup Access for this User** button. A list of users appears.

4. Select the user name from the list and click Setup Access for User button.

5. Query the channel to which you want to give privilege for this user.

6. Give the channel the desired privilege. The privileges that the administrator can assign are:

   • Delete: delete this channel

   • Update: update contents of this channel

   • View: view the Channel

   • Approve Content: approve content for this channel

Setting up Channel Access for a Group

Use this procedure to set up channel access for a group.

1. Log on to a specific application.

2. Navigate to MES > Administration > Channel Access.

3. If you know the group name, enter it and click **Setup Access for this Group** button or leave it blank and click **Setup Access for this Group** button. A list of group names appears.

4. Select the group name from the list and click **Setup Access for Group** button.

5. Query the channel to which you want to give privilege for this group.

6. Give the channel the desired privilege. The privileges that the administrator can assign are:

   • Delete: delete this channel

   • Update: update contents of this channel

   • View: view the Channel

   • Approve Content: approve content for this channel

Categories and Category Hierarchy

Categories in Oracle Marketing Encyclopedia System are a means to store, organize,

and distribute different types of content items in the MES repository e.g., Company News, Marketing, Sales etc.

You can view the different categories that are available from this screen. The MES administrator has to create categories and setup category hierarchies based on how it will be used by MES users. Administrator will have permissions to setup categories and category hierarchies.

Creating Categories

Use this procedure to create categories.

Steps:

1. Log on to a specific application.

2. Navigate to Administration > MES > Categories.

3. Add or update the category information.

Setting Up a Category Hierarchy

Use this procedure to set up a category hierarchy.

Steps:

1. Log on to a specific application.

2. Navigate to Administration > MES > CategoriesManager.

   This page allows an administrator to define the parent categories of each category. If the parent category is set to None, then this category becomes the root of a hierarchy.

Creating Content Types

Content type is an attribute assigned to all content. Content types allow you to refine the definition of content, thereby creating attributes which channels can receive. There are some seeded content types which will be provided. An administrator will have permissions to create new content types or modify/delete the existing content types.

Steps:

1. Log on to a specific application.

2. Navigate to MES >Administration > Content Type.

3. Add or update the content type information.

Creating Perspectives

Perspectives are attributes which can be assigned to all content. Perspectives allow you to refine the definition of content and create attributes that the channels can receive. Administrators will have permissions to create and maintain perspectives.

Steps:

1. Log on to a specific application.

2. Navigate to MES >Administration > Content Perspective.

3. Add or update the perspectives information.

Creating Channels

Channels are the lowest level in the hierarchy of categories that contain published items. The My Channels page displays all the categories and channels to which you have subscribed.

Channels are used by MES to distribute content items to users and to classify content in MES repository. An Administrator will have permissions to create new channels. The administrator can also optionally define if permission is needed for subscribing to or publishing content to the channel being created and the group of users who are to be the approvers for those privileges.

> **Note:** While defining a channel, you can optionally define content types, perspectives, item types, authors, and key words. These attributes are used by the matching engine to identify if any published item can implicitly be pushed into this channel by mapping these attribute values with the item attribute values. You can also indicate if an approval process is needed for publishing and subscribing to this channel. If approval is needed, and the user wants to change the default approvers, then the user can select the primary and secondary approvers.

Steps:

1. Log on to a specific application.

2. Navigate to Administration > MES > Create Channel. Each channel has a parent, which is either a category or a subcategory.

3.   Enter information in the required fields.

Publishing to Categories or Groups

You can publish an item type of a file, URL, or a message to various categories or groups.

Navigation: Administration > MES > Publish.

Notes:

• **Effective Start Date:**The content will not be visible through the category hierarchy before the Effective Start Date.

• **Channels section:** You can move a value from the Available table to the Selected table. The item gets published to the selected channels. If publishing to any of those channels requires approval, then the appropriate work flow is started.

• **Groups section:** Move a value from the Available table to the Selected table. The item is published to the selected group(s) and appears on the My Channels page.

Administering MES

You can perform all the administrative tasks associated with Oracle Marketing Encyclopaedia System from this tab.

Navigation: Administration > MES > Administration

Notes

• **Content Type:** Used to create and manage content types for published items.

• **Category Manager:** Used to create and manage new categories.

• **Hierarchy Manager:** Used to establish hierarchical relationship among categories.

• **Content Perspective:** Used to create and manage perspectives for published items.

• **Create Channel:** Used to create and assign properties to new channels.

Setting up Territories

Users can belong to different territories. Whenever any content item is published, the publisher can optionally specify to which territories the item should be published. For setting up territories, see the *Oracle CRM Foundation Implementation Guide.*

Setting up Workflow Time Out

MES administrators have to set up the Time out Workflow definitions, which direct the workflow engine the time that an item that needs approval has to wait in an approver's inbox. If the approver does not respond within the configured time, then the workflow engine performs the next action defined in the workflow process.

Changing the Default Values for Workflow Time Out

Use the workflow builder to change the time out value for any node in the work flow time out process.

Steps:

1. Start the workflow builder.

2. Connect to the application database.

3. In Show Item Types screen, move MES Approvals from the Hidden section to the visible section.

4. Under MES Approvals > Processes, you can see the following four processes:

    • Content Approval Process

    • Subscription Approval Process

    • Notify Approver- Publishing

    • Notify Approver- Subscription

        Note: Content Approval Process uses Notify Approver - Publishing and Subscription Approval Process uses Notify Approver - Subscription.

5. To change the default time out values, select the corresponding process. For example, if you want to change time out duration in Content Approval Process, double click **Notify Approver - Publishing**. To change time out values in Subscription Approval Process, double click **Notify Approver - Subscription**. Depending on the selection made, either the Notify Approver - Publishing or Notify Approver - Subscription screen appears.

6. Select and double click the Notification which has a prefix, **Publishing Approval Notification...** in its display name. The Navigator Control properties screen appears.

7. Select the Node tab. The Node tab has a Time out section that you can modify.

8. Modify the Time out section.

Setting up Proxy Information

Intermedia Index

If your application users will publish items of URL type, then you have to make sure that the intermedia indexes are properly generated. Proxy information is needed by Intermedia index for URL type item while regenerating the index to extract meta data information of the URL in the item. If the proxy information is not correctly setup, then MES will not be able to search the repository for URL type items because index regeneration would have failed on these items.

To setup proxy information, run $JTF_TOP/patch/115/sql/jtfiimt.sql using the following command.

```
sqlplus <apps-user>/<apps-password> @$JTF_ TOP/patch/115/sql/jtfiimt.sql
<jtf-user> <jtf-password> <proxy_ server_name:port>
<no_proxy_domain_name[,no_proxy_domain_name]>
```

Example
For Example:

sqlplus apps/apps @$JTF_TOP/patch/115/sql/jtfiimt.sql jtf jtf
"www-proxy.us.oracle.com:80" "us.oracle.com"

It will set up the intermedia media preference object. Once the above script is run successfully, run the following command to create the intermedia index.

```
sqlplus <apps-user>/<apps-password> @$JTF_TOP/patch/115/sql/jtfiaibu.sql
<jtf-user> <jtf-password>
```

Example
For Example:

sqlplus apps/apps @$JTF_TOP/patch/115/sql/jtfiaibut.sql jtf jtf

Setting up Concurrent Jobs

The MES administrator has to setup the concurrent jobs and the frequency at which they should run. MES provides context search on items stored in the MES repository. For the search functionality to work, there are some concurrent jobs that have to be configured in MES to perform InterMedia index generation for all the published items that are new. MES uses Oracle interMedia search functionality to do content level search. If this concurrent job is not run, then all the published items that are new cannot be searched through the Search user interface.

MES Intermedia Sync and Optimization Operation configures intermedia search on channel name and channel description.

The Rebuild Help Search Index Concurrent Program configures intermedia search on item name, description, URL string, and text message.

There are two types of concurrent programs bundled with MES. To configure InterMedia search, the following concurrent programs have to be run:

- **MES InterMedia Index Sync Operation/JTF InterMedia Sync Operation**

  The more frequently you run the Sync Concurrent Program, the faster your newly - reindexed text will be available for your searches. However, the more frequently the indexes are synchronized, slower the query performance due to fragmented indexes.

  > **Note:** You should run the concurrent program based on how quickly you want the new or updated information made available to your searchers. This depends on how often your customer publishes an item. If the load is low, you can run the concurrent program as quickly as possible. If the load is heavy, run the concurrent program every two to three hours.

- **MES InterMedia Index Optimizing Operation/JTF Item Intermedia Optimizing Operation**

  This concurrent program defragments the intermedia indexes (that were fragmented by the sync operation). Running this concurrent program will take a couple of hours and it should be run once every week, when there is less traffic in the system.

For MES InterMedia Index Optimizing Operation and JTF Item InterMedia Optimizing Operation, there are additional parameters that need to be run:

1. p_optimize_level: There are two types of optimization levels: fast optimization and full optimization.

   - Fast Optimization: deals only with fragmented rows. Fast optimization cannot be limited by time and it often takes a long time to complete, if it is being run for the first time on a badly fragmented index.

   - Full Optimization: glues rows back together in the same manner as fast optimization, but it also removes unrequired information related to deleted rows. It takes longer to run than fast optimization.

2. p_runtime: While running the optimization at full level, you can specify the time duration. This implies that it can be limited to quite times of the day (or week) for your application and the table can be optimized in stages. Many customers therefore prefer to always use full optimization.

- **MES Matching Engine**

This concurrent program matches newly published content items with the existing channels to which the items are not explicitly published. If newly published items match any of these channels, this concurrent program publishes them to these channels. Also, in a newly created channel, it verifies if any existing published items in the repository can be included. If the items can be included, then it will publish those items in that channel. If an item gets published to a channel implicitly and if that channel needs approvals to publish items, then approval process gets started automatically.

Concurrent Programs as a Part of a Standard Request

Use this procedure to include a concurrent program as a part of a standard request.

1. Log on to Self Service Application as:

   Username: SYSADMIN

   Password: SYSADMIN

   Select the System Administrator responsibility.

2. Click Security > Responsibility > Define. The Responsibilities window appears.

3. Search the Responsibility Name of System Administration. Check the Request Group section. Write down the Request Group Name and Application. For example, System Administrator Reports, Application Object Library.

4. Close this window.

5. Click Responsibility > Request. The Request Groups window appears.

6. Search for the Request Group that you wrote in Step 3. Example: System Administrator Reports Group.

7. Add all the Concurrent Programs mentioned in this guide in the Requests table. For example, MES InterMedia Index Optimizing operation, MES Matching Engine, MES InterMedia Index Sync Operation, JTF Item InterMedia, Index Sync Operation, and JTF Item InterMedia Index Optimizing operation.

   > **Note:** When you go to Submit a Request, you will see the concurrent programs that you added in the list.

Scheduling Concurrent Programs

1. Log on to Self Service Application.

2. Switch the responsibility to System Administrator.

3. Click Concurrent > Requests.

4. Click View. The Find Requests window appears.

5. Click Submit a New Request button.

6. Select the name of the concurrent program that you want to submit.

7. If a schedule is already setup, select the appropriate schedule or create your own schedule based on the information described above.

8. To create a schedule, click the **Schedule** button.

9. Enter information in the mandatory fields.

Guidelines

There is also an index on FND_LOBS table. A script has to be run to alter the index on this table whenever a File is stored. This index should be rebuilt periodically depending on the volatility of the data and after large uploads, otherwise it can get out of date.

Run the following script under $FND_TOP/sql/aflobbld.sql

```
sqlplus <APPSUSER>/<APPS_USER>@$FND_TOP/SQL/aflobbld.sql
```

Example
For example:

```
sqlplus apps/apps@$FND_TOP/sql/aflobbld.sql
```

A

System Profile Options

This appendix covers the following topics:

- Before You Begin
- About User Profile Options
- How to Set Profile Options
- Setting Oracle User Management Profile Options
- Oracle Common Application Components (JTT) Profile Options
- Oracle iSupport Profile Options
- Oracle TeleService Profile Options
- Oracle iStore Profile Options
- Returns Profile Options
- Oracle Knowledge Management Profile Options
- Miscellaneous Profile Options
- Oracle iSupport Parameters

Before You Begin

Before making Oracle Forms application settings, ensure that Oracle Forms application is up and running. All of the steps in this section require you to log onto Oracle Applications with the sysadmin login.

About User Profile Options

A user profile is a set of changeable options that affect the way Oracle applications appear and how they function. Oracle Applications uses a set of user profile options that are common to all the applications. In addition, each module has its own unique set of user profile options.

For a complete list of profile options in the Oracle Application Object Library, see *Oracle E-Business Suite Setup Guide*.

The system administrator sets user profile options at four levels that have a set hierarchy. From lowest level to highest, the profiles categories are:

1. **Site** - Option settings pertain to all users at an installation site; has the lowest priority.

2. **Application** - Option settings pertain to all users of any responsibility associated with the application; has the next-to-lowest priority.

3. **Responsibility** - Option settings pertain to all users currently signed on under the responsibility; has the second-highest priority.

4. **User** - Option settings pertain to an individual user, identified by application username; has the highest priority.

Each user profile ordinarily exists at each level. For example, Oracle Applications provides a site-level Printer option, an application-level Printer option, a responsibility-level option, and so on. Oracle Applications enforces the level hierarchy to ensure that a higher-level option value overrides a lower-level value, with Site being the lowest and User the highest in the hierarchy. If, for example, you set your site-level Printer option to print to Printer 1, but your user-level Printer option is set to Printer 2, then printing occurs at Printer 2.

Site-level option values are generally set by the system administrator before profile options are specified at the other three levels. The options specified at site-level work as defaults until the same options are specified at the other levels.

Changes to the user profile option values take effect as soon as your users log on again or change responsibilities.

How to Set Profile Options

Use the following procedure to set any profile option.

Steps

1. Log in to Oracle Applications with System Administrator responsibility.

2. Navigate to Profile > System.

3. Select the level(s) at which you wish to set the profile option.

   • **Site**

   • **Application** - If you choose this level, from the Application LOV, select the application for which you wish to set the profile option.

- **Responsibility** - If you choose this level, from the Responsibility LOV, select the responsibility for which you wish to set the profile option.

- **User** - If you choose this level, from the User LOV, select the user for whom you wish to set the profile option.

4. In the Profile field, enter the a partial profile name followed by the percent sign as a wildcard. **Example:** `%iSUPPORT%`.

5. Select Find. The System Profile Values window opens with the results of your search.

6. Verify or set the profile option(s) at the levels that you selected.

7. Save your work.

Setting Oracle User Management Profile Options

Several profile options affect the behavior of the Oracle (JTF) User Management module. Set these profile options at the site level according to your requirements.

For information on profile options for Oracle User Management, see the *Oracle E-Business Suite CRM System Administrator's Guide*. For more general information, see the user management and user setup chapters of this book.

- **JTA: User Management: Automatic Account Creation**- This profile option disables the automatic creation of an account when a user registers.

- **JTF_UM_APPROVAL_URL** - Defines the absolute path of the login page (jtflogin.jsp) that an approver must go to in order to accept or reject a request. The URL is included in the workflow notification sent to each approver. The same URL is sent to the user after their request is accepted or rejected.

- **JTF_UM_MERCHANT_NAME** - Defines the name of your organization. The workflow inserts this name into the request approvals and rejections when they are sent to the user.

- **JTF_UM_APPROVAL_OWNER** - Set by default to sysadmin, this profile option is used in the approval process. If the last approver in a predefined approval definition fails to approve a request, the person defined in this profile option will be the escalation point of contact and will receive the request. The user specified as the value for this profile option must have the CRM_HTML_ADMINISTRATION responsibility and the JTF_REG_APPROVAL and JTF_SECURITY_ASSIGN_ROLE permissions.

- **JTF_UM_APPROVAL_TIMEOUT_MINS** - Defines (in minutes) how long a

workflow notification remains in a queue before it is timed out. The default is 1440 (1 day). If you enter 0 as the value, no time out occurs. If no value is set, the profile option is defaulted to 0.

Note: The Process Timeout field in the parameters window when starting the JTF Approval workflow must be set to Yes for this profile option to take effect.

- **JTF_REGISTRATION_CACHE** - Determines whether the browser will cache the data entered by a user during the registration flow. The default value is Yes. If set to Yes and if the user presses the Back button, then the data entered on the previous page is available. If the profile option is set to No, then the data (page) expires as soon as the user leaves the page.

- **JTF_PRIMARY_USER** - Predetermines the username that corresponds with the Universal Primary User Approver.

- **JTF_INDIVIDUALUSER_ACCOUNT** - When set to Yes, this profile option creates a new account (in the HZ_CUST_ACCOUNTS table) for each individual user. It also associates the user with the corresponding account. Users must have an account in order to purchase products through Oracle iStore.

Oracle Common Application Components (JTT) Profile Options

Several Oracle Common Application Components (JTT) profile options must be set for the Oracle iSupport UI to appear. The values of the JTT profiles set the basic JTT Foundation default elements and values. These profiles are seeded in the Profiles window in ERP, and values are defined by the user (as System Administrator).

These affect all users logged in with any responsibility that is associated with the application.

Steps

1. Log on to Oracle Applications as sysadmin/sysadmin.

2. Select the System Administrator responsibility.

3. Navigate to Profile > System > Find System Profile Values window.

4. Query the system for JTF profile options:

   1. Check the Application check box. Clear the Site check box, if necessary.

   2. Enter iSupport in the Application field.

   3. In the Profile field, enter JTF_PROFILE%, and select Find.

5. Verify and/or set the following JTF profile option for Oracle iSupport. Use the topic

below, **Finding Responsibility ID and Application ID Values**, for assistance.

- **JTF_PROFILE_DEFAULT_RESPONSIBILITY** - This value tells the system which responsibility to grant to users who are automatically approved by the system. This default responsibility ID is different in every instance. Use the following steps to find this value.

  Finding Responsibility ID and Application ID Values

  Use the following steps to find the APPLICATION_ID and RESPONSIBILITY_ID value of a responsibility.

- Log in to the Oracle Applications as sysadmin. Select System Administrator responsibility. Navigate to Security > Responsibility > Define. The Responsibilities window opens.

- From the top menu, select View > Find. Search for the responsibility that you wish to be the default responsibility, highlight it, and click Ok in the search window. The Responsibilities window is populated with the record for the selected responsibility.

- With the cursor in any field of the record, select Help > Diagnostics > Examine. The Examine Field and Variable Values window opens.

- In the Examine Field and Variable Values window, select APPLICATION_ID from the Field LOV. The Value field displays the value of APPLICATION_ID.

- In the Examine Field and Variable Values window, select RESPONSIBILITY_ID from the Field LOV. The Value field displays the value of RESPONSIBILITY_ID.

6. Verify and/or set these additional JTF profile options for Oracle iSupport:

- **JTF_PROFILE_DEFAULT_APPLICATION** - 672.

  This sets the default application. This must be set to the Oracle iSupport application ID, 672.

- **JTF_PROFILE_DEFAULT_BLANK_ROWS** - 3

  This sets the default number of blank rows in tables on the Oracle iSupport UI. It can be set to any integer greater than zero. The recommended value is 3.

- **JTF_PROFILE_DEFAULT_CSS** - jtfucss.css

  This designates the default cascading style sheet to use for HTML display. The recommended value is jtfucss.css.

- **JTF_PROFILE_DEFAULT_CURRENCY** - USD

This tells the application which country's monetary currency to use as a default. Set it to USD for U.S. Dollars if this is what you wish the default currency to be.

- **JTF_PROFILE_DEFAULT_NUM_ROWS** - 10

  This tells the application how many rows to display when displaying tables on the UI. The recommended value is 10.

- **JTF_NAV_CUSTOM_RENDERER**

  This enables a custom menu with the java class name.

Oracle iSupport Profile Options

Some profile options are classified by Oracle iSupport profile category. The following table, page A-6 defines the profile option categories for the application.

Profile Option Categories for Oracle iSupport

Profile Category	Profile Option
iSupport Integration	Service: Default System Resource
iSupport Service Request	Service: Auto Launch Web Workflow
iSupport Service Request	Service: Publish Flag Update Allowed
iSupport Service Request	Service: Real-Time Automatic Assignment of Service Requests from iSupport

This section describes the profile options in Oracle iSupport. Many of them are required for the service request functionality to work in Oracle iSupport. You must set profile options in Oracle Forms. These profile values are specific to Oracle iSupport. For Oracle TeleService profile options, see the *Oracle TeleService Implementation Guide*.

Name of Profile Option	Description
Oracle iSupport: Assign Service Request to Default Owners when Auto Assignment is Off	Specifies whether the service request to be assigned to the default owners when Auto Assignment is Off. Default = Y.
Oracle iSupport: Authenticated Guest Responsibility	Stores the authenticated guest responsibility.
Oracle iSupport: Authenticated Guest User Responsibility	Determines what responsibility is assigned to an authenticated guest user when entering iSupport guest-enabled pages. This is used for the case where a user has a valid login but does not have the proper roles to use iSupport. Therefore, if such users view the iSupport public or guest pages, you give them this responsibility. Default value = IBU_AUTH_GUEST_USER_RESP
Oracle iSupport: Available Repositories for Knowledge Search	Specifies available repositories for knowledge search. Default = Solutions, Forums.
Oracle iSupport: Default Closed Service Request Status	This is the closed status of a service request when the user selects the Close button. However, when status transition is used, sysadmin needs to make sure that this status is a valid next status. Otherwise the applications error out. This value is mandatory and can be set at application and site levels.
Oracle iSupport: Default Contact Point Type for Service Request	Default = email.
Oracle iSupport: Default KM Solution Note Type	Used to define the default Oracle Knowledge Management solution note type.
Oracle iSupport: Default Mode while Showing Progress for a Service Request	Default = expanded.

Name of Profile Option	Description
Oracle iSupport: Default Note Type for Web Call Back Note	Stores the default note type for the callback note. The callback note is the question or statement that the customer enters while placing a callback request.
Oracle iSupport: Default Note Type when Service Request Escalation Is Requested	Specifies the default note type when a service request escalation is requested.
Oracle iSupport: Default Note Type when Service Request Is Closed	Specifies the default note type when a service request is closed.
Oracle iSupport: Default Note Type when Service Request Is Created	Specifies the default note type when a service request is created. Default = CS_PROBLEM
Oracle iSupport: Default Note Type when Service Request Is Updated	Specifies the default note type when a service request Is updated. Default = CS_PROBLEM.
Oracle iSupport: Default number of rows in support site dashboard bin	Default = 10.
Oracle iSupport: Default Reopened Service Request Status	Specifies the default reopened service request status.
Oracle iSupport: Default Service Request Attachment Category	Possible Values: Miscellaneous (default value) Can be set at all levels – Site, Application, Responsibility, and User
Oracle iSupport: Default Solved Service Request Status	This value determines the status of the service request when it is solved after a knowledge base search in Oracle iSupport. This value is mandatory, and can be set at application and site levels.

Name of Profile Option	Description
Oracle iSupport: Default Updated Service Request Status	During service request update, automatically highlights a particular service request status in the Status dropdown list on the Service Request Details page. A user does not need to explicitly select a status when updating a service request. However, the user still has the option to select a status from the status dropdown field if needed.
Oracle iSupport: Display Only Return Lines in Return Detail	Displays only return lines or return lines plus order lines in return detail.
Oracle iSupport: Enable Guest User	Indicates whether a service organization wants to utilize guest user functionality. Possible Values: • No (default value) – guest user feature not enabled • Yes – guest user feature enabled
Oracle iSupport: Enable Interaction Logging	Specifies whether to log interaction while creating or updating a service request.
Oracle iSupport: Enable iStore-iSupport Integrated Mode (Support Site)	Default = N.
Oracle iSupport: Enable Multi Party Access	Determines if multi-party access is enabled. This profile option can be set at Site and Responsibility levels. Default = N (at site level).
Oracle iSupport: Enable Platform in Template Search	Determines whether to use a platform in the criteria to search a template. Default = Y.
Oracle iSupport: Enable Problem Code in Template Search	Determines whether to use a problem code in the criteria to search a template. Default = N.

Name of Profile Option	Description
Oracle iSupport: Enable Product in Template Search	Determines whether to use a product in the criteria to search a template. Default = Y.
Oracle iSupport: Enable Request Type, Product, and Problem Code Mapping	Determines whether, in Oracle iSupport, problem codes can be associated with service request types and/or inventory items in a many to many relationship. This profile option can be set at all levels – Site, Application, Responsibility, and User. Possible values: • Yes: Enable the mapping between problem code, request type, and product. • No: Do not enable the mapping between problem code, request type, and product.
Oracle iSupport: Enable Service Request Type in Template Search	Determines whether to use a service request type in the criteria to search a template. Default = N.
Oracle iSupport: Enable Urgency in Template Search	Determines whether to use urgency in the criteria to search a template. Default = Y.
Oracle iSupport: Field Level Help Option	Specify Field Level Help Option. Default = ON.
Oracle iSupport: Field Level Tip Option	Specify Field Level Tip Option. Default = ON.
Oracle iSupport: Guest User Responsibility Name	Determines what responsibility is assigned to a guest user when entering iSupport guest enabled pages. Valid Values: Any valid responsibility Default Value: IBU_GUEST_USER_RESP (iSupport Guest User)

Name of Profile Option	Description
Oracle iSupport: Homepage multithread	Indicates if a home page will be rendered in multithread context. Default = N. **Note:** Although this profile is still present, it is no longer is use.
Oracle iSupport: Implementation Class to Populate Service Request Extended Attributes	Specifies the Java implementation class, which implements the interface provided, to populate service request extended attributes. The specified interface is used to take the responses provided by a user to the template questions during service request creation in iSupport and use them to populate the CIC extended attributes table after the service request is created. Based on these responses provided by the user, the CIC extended attributes functionality may launch tasks.
Oracle iSupport: Internal Organization for Employee Created Service Request	This defines the internal organization that an employee can select for employee-created service requests. The internal organization then determines the incident address. This profile overrides the default address supplied by Oracle Human Resources.
Oracle iSupport: Long List of Values of All Products	Specifies whether list of values of all products is long or not.
Oracle iSupport: Long List of Values of Customer Addresses	Specifies whether list of values of customer addresses is long or not.
Oracle iSupport: Long List of Values of Customer Contacts	Specifies whether list of values of customer contacts is long or not.
Oracle iSupport: Long List of Values of Employees	Specifies whether list of values of employees is long or not.
Oracle iSupport: Long List of Values of Registered Products	Specifies whether list of values of registered products is long or not.

Name of Profile Option	Description
Oracle iSupport: Mandatory Layout Time Stamp	Determines the value for the time stamp recorded on creation of a mandatory layout.
Oracle iSupport: Menu Name for Login bin on home page	Responsibility level default: • iSupport Guest User:IBU_GUEST_LOGINBIN_MENU • iSupport Site: Guest User:IBU_SITE_GUEST_LOGINBIN_MENU
Oracle iSupport: Menu Name for support resources bin on home page	Homepage Quick Menu name for iSupport. Responsibility level default: • iSupport Primary User:IBU_PRI_USER_HELP_MENU • iSupport Individual User:IBU_IND_USER_HELP_MENU • iSupport Business User:IBU_BUS_USER_HELP_MENU • iSupport Employee User:IBU_EMP_USER_HELP_MENU • iSupport Guest User:IBU_GUEST_USER_HELP_MENU • iSupport Site: Primary User:IBU_PRI_USER_HELP_MENU • iSupport Site: Business User:IBU_BUS_USER_HELP_MENU • iSupport Site: Individual User:IBU_IND_USER_HELP_MENU • iSupport Site: Guest User:IBU_GUEST_USER_HELP_MENU

Name of Profile Option	Description
Oracle iSupport: Name of the Service Organization	Displays the name of the service organization in service request log for updates made by support agents or the system. If this profile option is not set, Oracle iSupport service request log will display the actual resource name.
Oracle iSupport: Number of Expanded Rows when Progress of a Service Request is Shown Collapsed	Default = 3.
Oracle iSupport: Option to display Quick Find to a guest user	Possible Values: • No (default value) – Quick Find is not displayed to guest users • Yes – Quick Find is displayed to guest users This profile option can be set only at the Site level.
Oracle iSupport: Option to Track Solutions Viewed During Service Request Creation	This profile can be set at the Site and Responsibility levels. Its possible values are: • Do not track: Do not record the information about the solution viewed by a user with service request • Track as Note: Create a note only. This is the site default. • Track as Linked Solutions: Create a solution link for each solution viewed by a user along with feedback. • Track as both Note and Linked Solutions: Create both a note and linked solutions.
Oracle iSupport: Page Level Configuration Option	Possible values: • Off (default value) • On

Name of Profile Option	Description
Oracle iSupport: Product option for Solve a Problem bin on home page	Indicates if Home Page Solve a Problem Bin will show product selection.
	Default = Y. To achieve the expected result, you must also adjust correspondingly the profile option Knowledge: Display Product Search Criteria.
Oracle iSupport: Region/Field Level Configuration Option	Determines whether standard or customized mapping is used.
	Default = STANDARD.
Oracle iSupport: Select Service Request Type Layout Option	If the number of service request type categories exceeds the number defined in this profile, then they are displayed in two-column format. Whether service request type categories are shown in one-column layout or two-column layout, service request types are always shown in one-column format under their category. If service request type categories are not shown, then this same profile is used to control the display of service request types in one-column format or two-column format.
Oracle iSupport: Service Request Attachment Security Function	Site level default = CSXSRISR.
Oracle iSupport: Service Request Incident Address Validation Class	Specifies the Java class to validate an incident address when creating a service request.
Oracle iSupport: Service Request Reopen Time Limit in Hours	Set to the time limit in hours within which one can reopen a service request.
	Default = 0.
Oracle iSupport: Service Request Status when Escalation is Requested	-

Name of Profile Option	Description
Oracle iSupport: Service Request Template Option	Possible values • Do not Include Default and Highlight " Select One" Option • Do not Include Default and Highlight First One • Include Default and Highlight "Select One " Option (default value) • Include Default and Highlight Default • Include Default and Highlight First One Can be set at all levels – Site, Application, Responsibility, and User. Site level default = INCLDEFLTHLFIRST.
Oracle iSupport: Show Progress of a Service Request Ascending or Descending by Date	Specifies whether to show progress of a service request ascending or descending by date. Default = DESC.
Oracle iSupport: Show Welcome Text to Guest User on home page	Specifies whether or not to isupport home page show welcome text to a guest user. Default = N.
Oracle iSupport: Workflow Administrator	Specifies the workflow role to receive iSupport Home Page e-mail subscription errors. This profile option can be set at site and application level. The possible values are all the available workflow roles. Administrators may pick a role that is responsible for monitoring Oracle iSupport workflow activities.

Oracle TeleService Profile Options

Several Oracle TeleService profile options can be set according to your business requirements. Many of them concern service requests. Another set of profile options, which begin with CS_OWC, help to set up Oracle Web Conferencing, which Oracle

iSupport can use. See the *Oracle TeleService Implementation and User Guide* for further information about these profile options.

Oracle iStore Profile Options

If you are using the site framework, then you need to set Oracle iStore profile options relating to the following:

- Registration

- Site definition

- Site hierarchy

- Section layout and the template manager

- Pages such as Orders, Invoices, and Returns

For details on setting profile options from Oracle iStore, refer to the *Oracle iStore Implementation and Administration Guide*.

Returns Profile Options

The following profile options allow returns functionality in Oracle iSupport:

- **ASO: Default Order Type** - This profile determines how the order is to be processed in Oracle Order Management. The order types are set up in Oracle Order Management. This profile also determines what price list and currency code appear by default in the main Quoting window. If this profile value is null, no default value is assumed. Set to Mixed.

- **ASO: Default Order State** - Set to Booked.

- **ASO: Enable ASO Debug** - Set to Yes to allow returns debugging.

- **ASO: Product Organization** - Defines which product organization to look for products. *Note the space between the name ASO and the colon (:) in the name of the profile.* Set this to your master organization.

- **ASO: Validate Salesrep** - This profile is used to determine whether a Sales representative must be specified on a quote prior to creating an order. If this profile is set to Yes, a sales representative must be specified on the quote prior to creating an order. If this profile is set to No, then a sales representative will be defaulted from ASO: Default Salesrep. If this profile value is null, a default value of Yes is assumed. For Oracle iSupport, set this value to No.

- **OM: Debug Level** - This profile option determines the level of debug messages

printed in a OE Debug log file. To print all messages set it to 5 and for no messages set it to NULL. The default value is NULL.

- **OM: DEBUG LOG Directory** - The directory path of the OM debug log file. Specify the value from the session parameter `utl_file_dir` from `v$parameters`. The default value is NULL.

Oracle Knowledge Management Profile Options

Oracle Knowledge Management has its own set of profile options. If you are implementing it, refer to the *Oracle Knowledge Management Implementation and Administration Guide* for information on its profile options.

Miscellaneous Profile Options

A number of profile options categorized here as miscellaneous should be set at the site-level.

- **APPS_SERVLET_AGENT** - This is the URL that is used to call JSP forms from applications menus. Set it to the URL for the Apache server.

- **HZ: Generate Party Site Number** - This is a TCA profile used by the One-Time Address feature to determine how the site number should be derived. In the mode of creating a service request, if this profile is set to Yes, then the Site Number field is disabled. If the profile is set to No, then this field is enabled and is mandatory. Because Incident Address is not updatable after a service request is created in iSupport, in that case this field is display only.

- **OE: Item Validation Organization** - Set this to your master organization.

- **MO: Operating Unit** - Set this to your master organization.

- **Service: Default Address Style** - This determines the default address style for countries that have no address style for use in the address fields of service requests.

Oracle iSupport Parameters

This section describes the Oracle iSupport parameters, which all involve service requests.

- **IbuSRRequestTypeCategoryID**: This parameter can be passed to the Service Request Type Selection page as a URL parameter.

  If a service request type category ID is passed through this parameter and is associated with only one service request type, then the current page is directly routed to the first page in the service request creation flow.

If a service request type category ID is passed through this parameter, and more than one associated service request type exists, then only this service request type category and the associated service request types for this category are shown.

If a service request type category ID is passed to the Service Request Type Selection page and is not associated with any type, then an error message is shown in the service request selection page, and all of the eligible service request type categories and the associated service request types are shown in the Select Request Type region.

If a service request type category ID and a service request type ID are passed, then the service request type category ID is not used, and the way to show service request types has same the logic as in release 11.5.10.

- **IbuSRInvItemID**: This parameter can be passed to the Service Request Type Selection page as URL parameter. When an inventory item ID is passed through this parameter, it is validated. If it is a valid inventory item ID, then it is accepted. Otherwise, it is not used.

B

Lookups

This appendix covers the following topics:

- Lookup Types

Lookup Types

Lookup Types for Oracle iSupport

Lookup Types	Lookup codes	Meaning
IBE_UM_PARTNER_USER_TYPES	IBU_BUSINESS_PARTNER	Register as a user of an existing partner
IBE_UM_PRIMARY_USER_TYPES	IBU_PRIMARY	Register your company
IBE_UM_SECONDARY_USER_TYPES	IBU_BUSINESS	Register as a user of existing company
	IBU_BUSINESS_PARTIAL	Need online access to your existing corporate account?
	IBU_BUSINESS_PARTNER	
IBE_UM_STORE_USER_TYPES	IBU_PRIMARY	Register your company
	IBU_BUSINESS	Register as a user of existing company

Lookup Types	Lookup codes	Meaning
	IBU_BUSINESS_PARTIAL	Need online access to your existing corporate account?
IBE_UM_INDIVIDUAL_USER_TYPES	IBU_INDIVIDUAL	Register as individual
	IBU_INDIVIDUAL_PARTIAL	Need online access to your existing individual account?
IBE_UM_PARTIAL_USERTYPES	IBU_INDIVIDUAL_PARTIAL	Need online access to your existing individual account?
	IBU_BUSINESS_PARTIAL	Need online access to your existing corporate account?

C

Seeded Information

This appendix covers the following topics:

- Menus
- Oracle iSupport Menus
- Oracle iSupport Top Menus by Responsibility
- Oracle iSupport Functions
- User Responsibilities
- Registration
- Roles and Permissions
- Configurability

Menus

This section lists seeded menus associated with the application.

Oracle iSupport Menus

The following table shows Oracle iSupport main menus and their descriptions.

Oracle iSupport Menus

Menu	Description
IBU_ACCOUNT_MENU	Account tab
IBU_ADMINISTRATION	iSupport Administration

Menu	Description
IBU_ADMIN_ROOT_MENU	iSupport Administrator Menu Containing MES
IBU_ASKME_MENU	Ask Me submenu
IBU_A_APPS	iSupport Application Link
IBU_A_FB_MENU	Administration->Survey
IBU_A_FORUM_MENU	Administration->Forum
IBU_A_FR_CATEGORY_MENU	Forum Category subtab
IBU_A_FR_FORUM_MENU	Forum subtab
IBU_A_FR_USER_GROUP_MENU	User Group subtab
IBU_A_PROFILE_MENU	Administration->Homepage
IBU_A_ROOT_MENU	Administration
IBU_A_SUB	Administration->Homepage->Subscription
IBU_A_SUPPORT_MENU	Administration->Support
IBU_A_TOP_MENU	iSupport App Top Menu
IBU_A_USER_MENU	Administration->User
IBU_BUS_USER_HELP_MENU	Used for iSupport How Can We Help You bin for business users
IBU_BUS_USER_PROFILE_MENU	Profile-->
IBU_BUS_USER_TOP_MENU	Top menu for IBU Business User
IBU_CONFIG_ADMINISTRATION	iSupport Configuration Administration
IBU_DEFAULT_CONFIG_MENU	Configuration UI Menu

Menu	Description
IBU_EMPL_ISUPPORT_MENU	iSupport menu for IBU Employee
IBU_EMPL_REQ_MENU	REQ menu for IBU Employee
IBU_EMPL_USER_TOP_MENU	Top menu for IBU Employee
IBU_EMP_DEFAULT_CONFIG_MENU	Employee User Configuration UI Menu
IBU_EMP_USER_HELP_MENU	Used in iSupport How Can We Help You bin for employee users
IBU_EMP_USER_PROFILE_MENU	User Profile for Employees
IBU_GUEST_DEFAULT_CONFIG_MENU	Guest User Configuration UI Menu
IBU_GUEST_LOGINBIN_MENU	Login Menu
IBU_GUEST_SUPPORT_MENU	Support tab for Guest introduced in 1159
IBU_GUEST_USER_HELP_MENU	Used in iSupport How Can We Help You bin for guest users
IBU_GUEST_USER_TOP_MENU	Top menu for guest user
IBU_HLP_CALLME_ROOT_MENU	Contact Us - Root Menu
IBU_HLP_FEEDBACK_ROOT_MENU	Feedback - Root Menu
IBU_HOM_MENU	iSupport->Home
IBU_H_SITE_SELECT_ROOT_MENU	Site Selection Root Menu
IBU_IB_MENU	Home->Products
IBU_IND_USER_HELP_MENU	Used in iSupport How Can We Help You bin for individual users
IBU_IND_USER_PROFILE_MENU	User profile menu for IBU individual user
IBU_IND_USER_TOP_MENU	Top menu for IBU Individual User

Menu	Description
IBU_INQ_MENU	iSupport->Account
IBU_INQ_RMA_CRT	iSupport->Account->Returns->View/Create Returns
IBU_ISUPPORT_MENU	iSupport-->
IBU_NORMAL_USER_TOP_MENU	Top menu
IBU_PRIMARY_USER_ROOT_MENU	-
IBU_PRIMARY_USER_TOP_MENU	-
IBU_PRI_USER_HELP_MENU	Used in iSupport How Can We Help You bin for primary users
IBU_PRI_USER_REQ_MENU	iSupport-->Support-->
IBU_PRI_USER_TOP_MENU	Top menu for IBU Primary User
IBU_PROFILE_ACCOUNT_MENU	Menu for Account Setting
IBU_PROFILE_COMPANY_MENU	Company Profile Menu
IBU_PROFILE_EMP_MENU	Profile Menu for Employees (User portion only)
IBU_PROFILE_MENU	Menu for iSupport Settings
IBU_PROFILE_USER_MENU	User Profile Menu
IBU_REQ_MENU	Home->Support
IBU_REQ_MENU_GUEST	Support
IBU_ROOT_MENU	iSupport
IBU_ROOT_MENU_GUEST	-
IBU_ROOT_PROFILE_MENU	Root Menu for Profile

Menu	Description
IBU_SELF_SERVICE_TOP_MENU	Top Menu for iSupport Self Service User
IBU_SITE_ACCOUNT_ROOT_MENU	iSupport Site: Account Root Menu
IBU_SITE_ACCOUNT_TAB_MENU	iSupport Site: Account Menu
IBU_SITE_BUS_HOME_MENU	iSupport Site: Business User Home Menu
IBU_SITE_BUS_HOME_ROOT_MENU	iSupport Site: Business User Home Root Menu
IBU_SITE_BUS_USER_TOP_MENU	iSupport Site: Business User Top Menu
IBU_SITE_GUEST_HOME_MENU	iSupport Site: Guest User Home Menu
IBU_SITE_GUEST_HOME_ROOT_MENU	iSupport Site: Guest User Home Root Menu
IBU_SITE_GUEST_LOGINBIN_MENU	Site Login Menu
IBU_SITE_GUEST_USER_TOP_MENU	iSupport Site: Guest User Top Menu
IBU_SITE_PRI_HOME_MENU	iSupport Site: Primary User Home Menu
IBU_SITE_PRI_HOME_ROOT_MENU	iSupport Site: Primary User Home Root Menu
IBU_SITE_PRI_USER_TOP_MENU	iSupport Site: Primary User Top Menu
IBU_SITE_REG_HOME_MENU	iSupport Site: Regular User Home Menu
IBU_SITE_REG_HOME_ROOT_MENU	iSupport Site: Regular User Home Root Menu
IBU_SITE_REG_USER_TOP_MENU	iSupport Site: Regular User Top Menu
IBU_SUPPORT_MENU	Support tab introduced in 1159
IBU_SYS_ADMIN_TOP_MENU	iSupport Administrator Top Menu

Oracle iSupport Top Menus by Responsibility

The following table shows the top menus by responsibility.

Oracle iSupport Top Menus by Responsibility

Responsibility	Top Menu	Description
IBU_ADMINISTRATOR	IBU_ADMINISTRATION	Top menu for iSupport Administrator
IBU_BUSINESS_USER_RESP	IBU_BUS_USER_TOP_MENU	Top menu for iSupport Business (B2B) User
IBU_EMPLOYEE_USER_RESP	IBU_EMPL_USER_TOP_MENU	Top menu for iSupport Employee (B2E) User
IBU_GUEST_USER_RESP	IBU_GUEST_USER_TOP_MENU	Top menu for iSupport Guest User
IBU_AUTH_GUEST_USER_RESP	IBU_AUTH_GUEST_USER_TOP_MENU	Top menu for authorized iSupport Guest User
IBU_INDIVIDUAL_USER_RESP	IBU_IND_USER_TOP_MENU	Top menu for iSupport Individual (B2C) User
IBU_PRIMARY_USER_RESP	IBU_PRI_USER_TOP_MENU	Top menu for iSupport Primary User
IBU_SELF_SERVICE_HELPDESK_RESP	IBU_SELF_SERVICE_TOP_MENU	Top menu for the iSupport Self Service User
IBU_SITE_B2B_USER_RESP	IBU_SITE_BUS_USER_TOP_MENU	Top menu for iSupport Site Business User
IBU_SITE_B2C_USER_RESP	IBU_SITE_REG_USER_TOP_MENU	Top menu for iSupport Site Individual User
IBU_SITE_GUEST_USER_RESP	IBU_SITE_GUEST_USER_TOP_MENU	Top menu for iSupport Site Guest User
IBU_SITE_PRIMARY_USER_RESP	IBU_SITE_PRI_USER_TOP_MENU	Top menu for iSupport Site Primary User
IBU_SYS_ADMIN	IBU_SYS_ADMIN_TOP_MENU	Top menu for iSupport System Administrator

Oracle iSupport Functions

The following table shows the functions that are linked to menus, along with a description of each function.

Oracle iSupport Functions

Function	Description
IBU_ACCOUNT_CONTACT	not used
IBU_A_CAT_FN	Administration > Support > Technical Library
IBU_A_CM_FN	Administration > Support > Call Me
IBU_A_FB_LIST_FN	Administration > Survey > Feedback List
IBU_A_FR_CT_CREATE_FN	Administration > Category > Create
IBU_A_FR_CT_DELETE_FN	Administration > Category > Delete
IBU_A_FR_CT_MODSTATUS_FN	Administration > Category > Modify
IBU_A_FR_CT_RENAME_FN	Administration > Category > Rename
IBU_A_FR_FR_CREATE_FN	Administration > Forum > Create
IBU_A_FR_FR_DELETE_FN	Administration > Forum > Delete
IBU_A_FR_FR_MODATTR_FN	Administration > Forum > Modify Attribute
IBU_A_FR_FR_MODSTATUS_FN	Administration > Forum > Modify Status
IBU_A_FR_FR_MOVE_FN	Administration > Forum > Move
IBU_A_FR_FR_RENAME_FN	Administration > Forum > Rename
IBU_A_FR_MESSAGE_FN	Administration > Forum > Messages
IBU_A_FR_UG_ASSC_FN	Administration > Forum > Associate Usergroup

Function	Description
IBU_A_FR_UG_DISASSC_FN	Administration > Forum > Disassociate Usergroup
IBU_A_PZ_FN	Administration > Homepage > Personalize
IBU_A_RPT_FN	Not used in generic product.
IBU_A_SUB_FN	Administration > Homepage > Subscription subtab
IBU_A_TM_FN	Administration > Subscription > Template
IBU_A_UG_FN	Administration > Support > Usergroup
IBU_A_USER_APPROVALS_FN	Administration > User > Pending Approvals
IBU_A_USER_FN	Administration > Users
IBU_CMN_FORUM	Forum tab
IBU_COMPANY_ADDRESS	Profile > Company address
IBU_COMPANY_ADMIN	Profile > Company Administrators
IBU_COMPANY_CONTACT_POINTS	Profile > Contact points of company
IBU_COMPANY_INFORMATION	Profile > Company Information
IBU_GEN_PREF	Profile > General Preferences
IBU_HLP_CALLME	Support > Contact Us
IBU_HLP_FEEDBACK	Support > Survey
IBU_HOM_HOME	iSupport Home
IBU_INQ_ACCOUNT	Account
IBU_INQ_CONTRACTS	Account > Contracts

Function	Description
IBU_INQ_DEFECTS	Defects
IBU_INQ_INSTALLBASE	Install Base
IBU_INQ_INSTALLBASEREPORT	Install Base Report
IBU_INQ_INSTALLBASE_ADDPRODUCT	Install Base Add Product
IBU_INQ_INSTALLBASE_BUILT	Install Base as Built
IBU_INQ_INSTALLBASE_SUMMARY	Install Base Summary
IBU_INQ_INVOICES	Account > Invoices
IBU_INQ_ORDERS	Account > Orders
IBU_INQ_PAYMENTS	Account > Payments
IBU_INQ_RMAS	Account > Returns
IBU_LOGIN_FN	Applications Login page. If you want to use your own login page or to use the guest user home page as the login page, then you can customize IBU_LOGIN_FN to point to the appropriate JSP.
IBU_PERSONAL_PROFILE	Profile button
IBU_PROFILE_CONTRACT	not used
IBU_PROFILE_GENERAL	Profile > User Profile > Support
IBU_REGISTER_FN	JTF Register page
IBU_REQ_ASKME	Search Knowledge Base
IBU_REQ_CREATESR	Support > Create Service Requests
IBU_REQ_VIEWSR	Support > View Service Requests

Function	Description
IBU_SYSTEM_ADD	not used
IBU_SYSTEM_ADM	not used
IBU_SYSTEM_CSI	not used
IBU_SYSTEM_LIC	not used
IBU_SYSTEM_PRF	not used
IBU_SYSTEM_ROL	not used
IBU_SYSTEM_USR	not used
IBU_USER_ACCOUNTS	Profile > User Profile > Account
IBU_USER_ADDRESSES	Profile > User Profile > Addresses
IBU_USER_CONTACTPOINTS	Profile > User Profile > Contact Points
IBU_USER_CONTRACTS	not used

User Responsibilities

The following table displays seeded user responsibilities and their descriptions.

Oracle iSupport User Responsibilities

Responsibility Key	Responsibility Name	Description
IBU_ADMINISTRATOR	iSupport Administrator	iSupport Administrator
IBU_AUTH_GUEST_USER_RESP	iSupport Authenticated Guest User	Guest user responsibility that is dynamically assigned to authenticated users not set up in iSupport when accessing a public page.

Responsibility Key	Responsibility Name	Description
IBU_BUSINESS_USER_RESP	iSupport Business User	Access privileges for receiving web support for a business user
IBU_EMPLOYEE_USER_RESP	iSupport Employee User	Access privileges for receiving web support for an employee of the support organization
IBU_GUEST_USER_RESP	iSupport Guest User	Access privileges for receiving web support for a guest user
IBU_INDIVIDUAL_USER_RESP	iSupport Individual User	Access privileges for receiving web support for an individual user
IBU_PRIMARY_USER_RESP	iSupport Primary User	Access privileges for receiving web support for a primary user
IBU_SELF_SERVICE_HELPDESK_RESP	iSupport Self-Service Helpdesk	Access privileges for receiving web support for a self-service user
IBU_SITE_B2B_USER_RESP	iSupport Site: Business User	Access privileges for support sites for a business user
IBU_SITE_B2C_USER_RESP	iSupport Site: Individual User	Access privileges for support sites for an individual user
IBU_SITE_GUEST_USER_RESP	iSupport Site: Guest User	Access privileges for support sites for a guest user
IBU_SITE_PRIMARY_USER_RESP	iSupport Site: Primary User	Access privileges for support sites for a primary user
IBU_SYS_ADMIN	iSupport System Administrator	iSupport System Admin

Registration

This section contains information about seeded user types and enrollments that are required for registration.

Oracle iSupport User Types

Registration User Types for Standalone Oracle iSupport

User Type Key	Activate Enrollments	Comment
IBU_INDIVIDUAL	IBU_INDIVIDUAL (self service)	
IBU_INDIVIDUAL_PARTIAL	IBU_INDIVIDUAL (self service)	This user type is not active out of box. If you activate this user type, then select and activate enrollment IBU_INDIVIDUAL for this user type.
IBU_PRIMARY	IBU_PRIMARY (self service), IBU_BUSINESS (automatic)	
IBU_BUSINESS	IBU_BUSINESS (self service)	
IBU_BUSINESS_PARTIAL	IBU_BUSINESS (self service)	This user type is not active out of box. If you activate this user type, then select and activate enrollment IBU_BUSINESS for this user type.
IBU_BUSINESS_PARTNER	IBU_BUSINESS(self service)	This user type is not active out of box. If you activate this user type, then select and activate enrollment IBU_BUSINESS for this user type.

Integrated Registration User Types for Oracle iSupport and Oracle iStore

User Type Key	Activate Enrollments	Comment
IBE_INDIVIDUAL	IBU_SITE_INDIVIDUAL_USER	

User Type Key	Activate Enrollments	Comment
IBE_INDIVIDUAL_PARTIAL	IBU_SITE_INDIVIDUAL_USER	This user type is not active out of box. If you activate this user type, then select and activate enrollment IBU_SITE_INDIVIDUAL_USER for this user type.
IBE_PRIMARY	IBU_SITE_BUSINESS_USER	
	IBU_SITE_PRIMARY_USER	
IBE_BUSINESS	IBU_SITE_BUSINESS_USER	
IBE_BUSINESS_PARTIAL	IBU_SITE_BUSINESS_USER	This user type is not active out of box. If you activate this user type, then select and activate enrollment IBU_SITE_BUSINESS_USER for this user type.
IBE_PARTNER_BUSINESS	IBU_SITE_BUSINESS_USER	This user type is not active out of box. If you activate this user type, then select and activate enrollment IBU_SITE_BUSINESS_USER for this user type.

Additional Information about User Types

Other Info: User Type Key	Description
IBU_INDIVIDUAL	Individual users include new and existing users with no specific relationship to or representation of a business entity.
IBU_INDIVIDUAL_PARTIAL	Create an online user account for existing individual customers.

Other Info: User Type Key	Description
IBU_PRIMARY	Primary users are points of contacts for businesses and organizations. Select this option if you are the first person to register your business entity. You will be responsible for managing all users within your organization. This includes the validation and approval of users. Thus, you will serve as the administrator for your business entity.
IBU_BUSINESS	Business users have their organizations already registered in the system. To register, you will need your Registry ID. Please register as a primary user if you are the point of contact or first user for your entity. **Note:** Using this user type requires a Registry ID from a previously registered business entity.
IBU_BUSINESS_PARTIAL	Create online user account for existing contacts of a company
IBU_BUSINESS_PARTNER	Create an online user account for a non-primary user of an already registered partner organization. **Note:** To register, you need an organization Registry ID.

Oracle iSupport Enrollments

This section provides the enrollment information for Oracle iSupport:

- Enrollment: IBU_PRIMARY

  - Responsibility: iSupport Primary User

  - Role: IBU_B2B_PRIMARY_USER_MANAGEMENT, IBU_REG_USER

- Enrollment: IBU_INDIVIDUAL (B2C User)

  - Responsibility: iSupport Individual User

  - Role: IBU_REG_USER

- Enrollment: IBU_BUSINESS

  - Responsibility: iSupport Business User

  - Role: IBU_REG_USER

- Enrollment: IBU_SITE_BUSINESS_USER

  - Name: Support Site: Business User

  - Description: Sign up to receive self-service support from our Web site using your organization account.

  - Responsibility: IBU_SITE_B2B_USER_RESP

  - Apply changed to existing subscribers: No

  - Assigned Roles: IBU_BUSINESS_USER

  - Application Owner: Oracle iSupport

  - Approval By: No Approval is required

  - Enrollment Template: Generic Template

  - Delegation Role: None

- Enrollment: IBU_SITE_INDIVIDUAL_USER

  - Name: Support Site: Individual User

  - Description: Sign up to receive self-service support from our web site.

  - Responsibility: IBU_SITE_B2C_USER_RESP

  - Apply changed to existing subscribers: No

  - Assigned Roles: IBU_REGULAR_USER

  - Application Owner: Oracle iSupport

  - Approval By: No Approval is required

  - Enrollment Template: Generic Template

  - Delegation Role: None

- Enrollment: IBU_SITE_PRIMARY_USER (Primary User)

- Name: Support Site: Primary User

- Description: Sign up to receive self-service support and manage users directly from our web site.

- Responsibility: IBU_SITE_PRIMARY_USER_RESP

- Apply changed to existing subscribers: No

- Assigned Roles: IBU_PRIMARY_USER, IBU_BUSINESS_USER

- Application Owner: Oracle iSupport

- Approval By: No Approval is required

- Enrollment Template: Generic Template

- Delegation Role: None

Roles and Permissions

The following table lists Oracle iSupport roles and permissions.

Oracle iSupport Roles and Permissions

Role	Permission	Description
IBU_B2B_PRIMARY_USER_MANAGEMENT	IBU_ADMIN_UPDATE	IBU ADMIN UPDATE
IBU_B2B_PRIMARY_USER_MANAGEMENT	IBU_ADMIN_VIEW	IBU ADMIN VIEW
IBU_B2B_PRIMARY_USER_MANAGEMENT	IBU_Account_Create	To Create an Account to a party or organization
IBU_B2B_PRIMARY_USER_MANAGEMENT	IBU_USER_MGMT	Permission for User Management
IBU_B2B_PRIMARY_USER_MANAGEMENT	IBU_USER_MGMT_VIEW_COMPANY_USER	Permission to view company user
IBU_B2B_PRIMARY_USER_MANAGEMENT	IBU_USER_MGMT_VIEW_MY_ROLE	Permission to view only my role

Role	Permission	Description
IBU_B2B_PRIMARY_USER_MANAGEMENT	JTF_PRIMARY_USER_SUMMARY	JTF Primary User
IBU_BUSINESS_USER	CSI_ACCT_ACCESS_ONLY	Restricts the users access to Install Base products based on an Account
IBU_BUSINESS_USER	CSI_ADDI_ATTR_UPDATE	Update permission for csi Additional Attributes page.
IBU_BUSINESS_USER	CSI_ADDI_ATTR_VIEW	View permission for csi Additional Attributes page.
IBU_BUSINESS_USER	CSI_CONTACT_DETAIL_UPDATE	Update permission for Contact Detail page
IBU_BUSINESS_USER	CSI_CONTACT_DETAIL_VIEW	View permission for Contact Detail page
IBU_BUSINESS_USER	CSI_CONTRACT_UPDATE	Update permission for Contract page
IBU_BUSINESS_USER	CSI_CONTRACT_VIEW	View permission for Contract page
IBU_BUSINESS_USER	CSI_CREATE_INST_UPDATE	Update permission for Create Instance page
IBU_BUSINESS_USER	CSI_CREATE_INST_VIEW	View permission for Create Instance page
IBU_BUSINESS_USER	CSI_GENERAL_ATTRIB_CUST_ONLY	Makes certain Customer product attributes read only
IBU_BUSINESS_USER	CSI_INST_CONFIG_UPDATE	Update permission for Instant Config page
IBU_BUSINESS_USER	CSI_INST_CONFIG_VIEW	View permission for Instant Config page
IBU_BUSINESS_USER	CSI_INST_GENERAL_UPDATE	Update permission for Instant General page

Role	Permission	Description
IBU_BUSINESS_USER	CSI_INST_GENERAL_VIEW	View permission for Instant General page
IBU_BUSINESS_USER	CSI_LATEST_TRANSACTION_UPDATE	Update permission for Latest Transaction page
IBU_BUSINESS_USER	CSI_LATEST_TRANSACTION_VIEW	View permission for Latest Transaction page
IBU_BUSINESS_USER	CSI_PARTY_CONTACT_UPDATE	Update permission for Party Contact page
IBU_BUSINESS_USER	CSI_PARTY_CONTACT_VIEW	View permission for Party Contact page
IBU_BUSINESS_USER	CSI_PERZ_EDIT_UPDATE	Update Permission for personalization edit page
IBU_BUSINESS_USER	CSI_PERZ_EDIT_VIEW	View permission for personalization edit page
IBU_BUSINESS_USER	CSI_PRICING_UPDATE	Update permission for Pricing page
IBU_BUSINESS_USER	CSI_PRICING_VIEW	View permission for Pricing page
IBU_BUSINESS_USER	CSI_PROPERTY_READ	Read the CSI Properties
IBU_BUSINESS_USER	CSI_REPAIR_ORDER_UPDATE	Update permission for Repair Order page
IBU_BUSINESS_USER	CSI_REPAIR_ORDER_VIEW	View permission for Repari Order page
IBU_BUSINESS_USER	CSI_SEARCH_PRODUCT_UPDATE	Update permission for Search Product page
IBU_BUSINESS_USER	CSI_SEARCH_PRODUCT_VIEW	View permission for Search Product page

Role	Permission	Description
IBU_BUSINESS_USER	CSI_SERVICE_REQUEST_UP DATE	Update permission for Service Request page
IBU_BUSINESS_USER	CSI_SERVICE_REQUEST_VI EW	View permission for Service Request page
IBU_BUSINESS_USER	CSI_SHOW_EXT_CONTACT S	Restricts Install Base User to view only the external contacts
IBU_BUSINESS_USER	CSI_SHOW_EXT_LOCATIO NS	Restricts the Install Base user to view only external locations
IBU_BUSINESS_USER	CSI_SHOW_EXT_PARTIES	Restricts the user to View only the External parties
IBU_BUSINESS_USER	CSI_SHOW_INST_CUSTOM ER_MENU	Permission to have the Install Base Customer facing instance details Menu
IBU_BUSINESS_USER	CSI_SPLIT_QUANTITY_UPD ATE	Update permission for Split Quantity page
IBU_BUSINESS_USER	CSI_SPLIT_QUANTITY_VIE W	View permission for Split Quantity page
IBU_BUSINESS_USER	CSI_TRANSACTION_DETAI L_UPDATE	Update permission for Transaction Detail page
IBU_BUSINESS_USER	CSI_TRANSACTION_DETAI L_VIEW	View permission for Transaction Detail page
IBU_BUSINESS_USER	CSI_TRANSACTION_INSTA NCE_UPDATE	Update permission for Transaction Instance page
IBU_BUSINESS_USER	CSI_TRANSACTION_INSTA NCE_VIEW	View permission for Transaction Instance page
IBU_BUSINESS_USER	CS_Advanced_Search	Knowledge:Search: Permission to view the KM Advanced Search Page

Role	Permission	Description
IBU_BUSINESS_USER	CS_Freq_Used_Sol_View	Knowledge:Search: Permission to View frequently used solutions
IBU_BUSINESS_USER	CS_Products_Add	Add New Products Not through OM
IBU_BUSINESS_USER	CS_Products_Delete	Delete product from customer view
IBU_BUSINESS_USER	CS_Products_Report	Install Base Report
IBU_BUSINESS_USER	CS_Products_Update	Change purchased product status and location
IBU_BUSINESS_USER	CS_Products_View	View Purchased Products
IBU_BUSINESS_USER	CS_Rec_Sol_View	Knowledge:Setup: Permission to view recommended solutions
IBU_BUSINESS_USER	CS_Solution_View	Knowledge:Search: Permission to view solution
IBU_BUSINESS_USER	CS_Solution_View_Public	Knowledge Management view public solutions
IBU_BUSINESS_USER	CS_Statement_View	Knowledge:Search: Permission to view statement
IBU_BUSINESS_USER	CS_USED_COUNT_UPDATE	Knowledge:Search: Permission to update solution used count
IBU_BUSINESS_USER	IBE_CHANGE_BILLTO_CONTACT	Permission to change the bill-to contact while placing the order for an organization
IBU_BUSINESS_USER	IBE_CREATE_RETURN	Permission to create return
IBU_BUSINESS_USER	IBE_INT_ADMINISTRATORS	Permission to view primary users of the organization

Role	Permission	Description
IBU_BUSINESS_USER	IBE_INT_ORG_ADDRESS_BOOK	Permission to view organization address book
IBU_BUSINESS_USER	IBE_INT_ORG_DETAILS	Permission to view organization details
IBU_BUSINESS_USER	IBE_INT_ORG_EMAIL_ADDRESSES	Permission to view organization email addresses
IBU_BUSINESS_USER	IBE_INT_ORG_PHONE_NUMBERS	Permission to view organization phone number functionality
IBU_BUSINESS_USER	IBE_INT_ORG_TELEX_NUMBERS	Permission to view organization telex numbers functionality
IBU_BUSINESS_USER	IBE_VIEW_INVOICE	Permission to view invoice
IBU_BUSINESS_USER	IBE_VIEW_ORDER	Permission to view order
IBU_BUSINESS_USER	IBE_VIEW_PAYMENT	-
IBU_BUSINESS_USER	IBE_VIEW_RETURN_ORDER	Permission to view return order
IBU_BUSINESS_USER	IBU_CallMe	Submit a request for an agent to call back
IBU_BUSINESS_USER	IBU_Contracts_View	View Customer Contracts
IBU_BUSINESS_USER	IBU_DEPOT_VIEW	Depot Repair Orders View Permission. Used for depot repair summary, detail, and search pages.
IBU_BUSINESS_USER	IBU_Defects_View	View Product Defects
IBU_BUSINESS_USER	IBU_Homepage	-
IBU_BUSINESS_USER	IBU_Homepage_Update	IBU Homepage Update

Role	Permission	Description
IBU_BUSINESS_USER	IBU_Invoices_View	View Customer Invoices
IBU_BUSINESS_USER	IBU_Orders_View	View Customer Orders
IBU_BUSINESS_USER	IBU_Payments_View	View Payments
IBU_BUSINESS_USER	IBU_Profile_Update	Update profile/personalization information
IBU_BUSINESS_USER	IBU_Profile_View	View customer profile/personalization information
IBU_BUSINESS_USER	IBU_Request_Add_Contact	Add a Contact to Service Request
IBU_BUSINESS_USER	IBU_Request_Close	Close a service request
IBU_BUSINESS_USER	IBU_Request_Create	Create a service request
IBU_BUSINESS_USER	IBU_Request_Email_To_Me	Request Service Request Details by Email
IBU_BUSINESS_USER	IBU_Request_Escalate	Change service request urgency
IBU_BUSINESS_USER	IBU_Request_Manage_Templates	Create, Update Service Request Templates
IBU_BUSINESS_USER	IBU_Request_Manage_Views	Create, Update Service Request Views/Saved Searches.
IBU_BUSINESS_USER	IBU_Request_Reopen	Reopen a Service Request
IBU_BUSINESS_USER	IBU_Request_Search	Search Service Requests
IBU_BUSINESS_USER	IBU_Request_Update	Add a comment to an open service request

Role	Permission	Description
IBU_BUSINESS_USER	IBU_Request_Update_Solution_Usefulness	Update Usefulness of the Solutions Suggested for a Service Request
IBU_BUSINESS_USER	IBU_Request_View	View service requests
IBU_BUSINESS_USER	IBU_Request_View_Account	iSupport view account service requests
IBU_BUSINESS_USER	IBU_Request_View_Company	-
IBU_BUSINESS_USER	IBU_Request_View_Self	View service requests created by the user for which the user is an active contact
IBU_BUSINESS_USER	IBU_Returns_Add	Create Return for a Product
IBU_BUSINESS_USER	IBU_Returns_View	View Customer Returns
IBU_BUSINESS_USER	IBU_SR_SEND_EMAIL	permission for user to send email (Service Request)
IBU_BUSINESS_USER	IBU_SR_TASK_VIEW_PUBLISH	The permission to view only publish tasks
IBU_BUSINESS_USER	IBU_SR_UPLOAD_ATTACHMENT	Upload Attachment to Service Request
IBU_BUSINESS_USER	IBU_SR_VIEW_PROFILE_UPDATE	View and profile update permission
IBU_BUSINESS_USER	IBU_Survey_Create	Fill in a pre-defined survey
IBU_BUSINESS_USER	IBU_Technical_Library_View	View technical documentation
IBU_BUSINESS_USER	IBU_UPDATE_SUPPORT_PREFERENCES	iSupport Site: Profile: Support Preferences: Update
IBU_BUSINESS_USER	IBU_VIEW_SUPPORT_PREFERENCES	iSupport Site: Profile: Support Preferences: View

Role	Permission	Description
IBU_EMPLOYEE	CS_Advanced_Search	Knowledge:Search: Permission to view the KM Advanced Search Page
IBU_EMPLOYEE	CS_Freq_Used_Sol_View	Knowledge:Search: Permission to View frequently used solutions
IBU_EMPLOYEE	CS_Products_Add	Add New Products Not through OM
IBU_EMPLOYEE	CS_Products_Delete	Delete product from customer view
IBU_EMPLOYEE	CS_Products_Report	Install Base Report
IBU_EMPLOYEE	CS_Products_Update	Change purchased product status and location
IBU_EMPLOYEE	CS_Products_View	View Purchased Products
IBU_EMPLOYEE	CS_Rec_Sol_View	Knowledge:Setup: Permission to view recommended solutions
IBU_EMPLOYEE	CS_Solution_View	Knowledge:Search: Permission to view solution
IBU_EMPLOYEE	CS_Solution_View_All	Knowledge Management view all solutions
IBU_EMPLOYEE	CS_Solution_View_B	-
IBU_EMPLOYEE	CS_Solution_View_Internal	Knowledge:Search: Permission to view public and internal solutions
IBU_EMPLOYEE	CS_Statement_View	Knowledge:Search: Permission to view statement

Role	Permission	Description
IBU_EMPLOYEE	CS_USED_COUNT_UPDATE	Knowledge:Search: Permission to update solution used count
IBU_EMPLOYEE	IBU_Homepage	-
IBU_EMPLOYEE	IBU_Homepage_Update	IBU Homepage Update
IBU_EMPLOYEE	IBU_Profile_Update	Update profile/personalization information
IBU_EMPLOYEE	IBU_Profile_View	View customer profile/personalization information
IBU_EMPLOYEE	IBU_Request_Add_Contact	Add a Contact to Service Request
IBU_EMPLOYEE	IBU_Request_Close	Close a service request
IBU_EMPLOYEE	IBU_Request_Create	Create a service request
IBU_EMPLOYEE	IBU_Request_Email_To_Me	Request Service Request Details by Email
IBU_EMPLOYEE	IBU_Request_Escalate	Change service request urgency
IBU_EMPLOYEE	IBU_Request_Manage_Templates	Create, Update Service Request Templates
IBU_EMPLOYEE	IBU_Request_Manage_Views	Create, Update Service Request Views/Saved Searches.
IBU_EMPLOYEE	IBU_Request_Reopen	Reopen a Service Request
IBU_EMPLOYEE	IBU_Request_Search	Search Service Requests
IBU_EMPLOYEE	IBU_Request_Update	Add a comment to an open service request

Role	Permission	Description
IBU_EMPLOYEE	IBU_Request_Update_Solution_Usefulness	Update Usefulness of the Solutions Suggested for a Service Request
IBU_EMPLOYEE	IBU_Request_View	View service requests
IBU_EMPLOYEE	IBU_REQUEST_VIEW_SELF	View service requests created by the employee for which the employee is an active contact
IBU_EMPLOYEE	IBU_SR_TASK_VIEW_PUBLIC	Oracle iSupport: show public task only
IBU_EMPLOYEE	IBU_SR_TASK_VIEW_PUBLISH	The permission to view only publish tasks
IBU_EMPLOYEE	IBU_SR_UPLOAD_ATTACHMENT	Upload Attachment to Service Request
IBU_EMPLOYEE	IBU_SR_VIEW_PROFILE_UPDATE	View and profile update permission
IBU_EMPLOYEE	IBU_Survey_Create	Fill in a predefined survey
IBU_EMPLOYEE	IBU_Technical_Library_View	View technical documentation
IBU_FORUM_ADMINISTRATOR	IBU_Forum	View and post threads
IBU_FORUM_ADMINISTRATOR	IBU_Forum_Category_Edit	
IBU_FORUM_ADMINISTRATOR	IBU_Forum_Edit	
IBU_FORUM_ADMINISTRATOR	IBU_Forum_View	HA enabled page view permission for forum client.
IBU_FORUM_ADMINISTRATOR	IBU_Forum_View_Open	

Role	Permission	Description
IBU_FORUM_ADMINISTRATOR	IBU_Forum_View_Restrict	
IBU_FORUM_USER	IBU_Forum	View and post threads
IBU_FORUM_USER	IBU_Forum_View	HA enabled page view permission for forum client.
IBU_FORUM_USER	IBU_Forum_View_Open	
IBU_FORUM_USER	IBU_Forum_View_Restrict	
IBU_GUEST_USER	CS_Solution_View	Knowledge:Search: Permission to view solution
IBU_GUEST_USER	IBU_Guest_User	Guest user permission
IBU_GUEST_USER	IBU_Homepage	-
IBU_GUEST_USER	IBU_Homepage_Hide_Customize	Permission to hide personalization link
IBU_GUEST_USER	IBU_Technical_Library_View	View technical documentation
IBU_PRIMARY_USER	CSI_ACCT_ACCESS_ONLY	Restricts the users access to Install Base products based on an Account
IBU_PRIMARY_USER	CSI_ADDI_ATTR_UPDATE	Update permission for csi Additional Attributes page.
IBU_PRIMARY_USER	CSI_ADDI_ATTR_VIEW	View permission for csi Additional Attributes page.
IBU_PRIMARY_USER	CSI_CONTACT_DETAIL_UPDATE	Update permission for Contact Detail page
IBU_PRIMARY_USER	CSI_CONTACT_DETAIL_VIEW	View permission for Contact Detail page

Role	Permission	Description
IBU_PRIMARY_USER	CSI_CONTRACT_UPDATE	Update permission for Contract page
IBU_PRIMARY_USER	CSI_CONTRACT_VIEW	View permission for Contract page
IBU_PRIMARY_USER	CSI_CREATE_INST_UPDATE	Update permission for Create Instance page
IBU_PRIMARY_USER	CSI_CREATE_INST_VIEW	View permission for Create Instance page
IBU_PRIMARY_USER	CSI_GENERAL_ATTRIB_CUST_ONLY	Makes certain Customer product attributes read only
IBU_PRIMARY_USER	CSI_INST_CONFIG_UPDATE	Update permission for Instant Config page
IBU_PRIMARY_USER	CSI_INST_CONFIG_VIEW	View permission for Instant Config page
IBU_PRIMARY_USER	CSI_INST_GENERAL_UPDATE	Update permission for Instant General page
IBU_PRIMARY_USER	CSI_INST_GENERAL_VIEW	View permission for Instant General page
IBU_PRIMARY_USER	CSI_LATEST_TRANSACTION_UPDATE	Update permission for Latest Transaction page
IBU_PRIMARY_USER	CSI_LATEST_TRANSACTION_VIEW	View permission for Latest Transaction page
IBU_PRIMARY_USER	CSI_PARTY_CONTACT_UPDATE	Update permission for Party Contact page
IBU_PRIMARY_USER	CSI_PARTY_CONTACT_VIEW	View permission for Party Contact page
IBU_PRIMARY_USER	CSI_PERZ_EDIT_UPDATE	Update Permission for personalization edit page

Role	Permission	Description
IBU_PRIMARY_USER	CSI_PERZ_EDIT_VIEW	View permission for personalization edit page
IBU_PRIMARY_USER	CSI_PRICING_UPDATE	Update permission for Pricing page
IBU_PRIMARY_USER	CSI_PRICING_VIEW	View permission for Pricing page
IBU_PRIMARY_USER	CSI_PROPERTY_READ	Read the CSI Properties
IBU_PRIMARY_USER	CSI_REPAIR_ORDER_UPDATE	Update permission for Repair Order page
IBU_PRIMARY_USER	CSI_REPAIR_ORDER_VIEW	View permission for Repari Order page
IBU_PRIMARY_USER	CSI_SEARCH_PRODUCT_UPDATE	Update permission for Search Product page
IBU_PRIMARY_USER	CSI_SEARCH_PRODUCT_VIEW	View permission for Search Product page
IBU_PRIMARY_USER	CSI_SERVICE_REQUEST_UPDATE	Update permission for Service Request page
IBU_PRIMARY_USER	CSI_SERVICE_REQUEST_VIEW	View permission for Service Request page
IBU_PRIMARY_USER	CSI_SHOW_EXT_CONTACTS	Restricts Install Base User to view only the external contacts
IBU_PRIMARY_USER	CSI_SHOW_EXT_LOCATIONS	Restricts the Install Base user to view only external locations
IBU_PRIMARY_USER	CSI_SHOW_EXT_PARTIES	Restricts the user to View only the External parties

Role	Permission	Description
IBU_PRIMARY_USER	CSI_SHOW_INST_CUSTOMER_MENU	Permission to have the Install Base Customer facing instance details Menu
IBU_PRIMARY_USER	CSI_SPLIT_QUANTITY_UPDATE	Update permission for Split Quantity page
IBU_PRIMARY_USER	CSI_SPLIT_QUANTITY_VIEW	View permission for Split Quantity page
IBU_PRIMARY_USER	CSI_TRANSACTION_DETAIL_UPDATE	Update permission for Transaction Detail page
IBU_PRIMARY_USER	CSI_TRANSACTION_DETAIL_VIEW	View permission for Transaction Detail page
IBU_PRIMARY_USER	CSI_TRANSACTION_INSTANCE_UPDATE	Update permission for Transaction Instance page
IBU_PRIMARY_USER	CSI_TRANSACTION_INSTANCE_VIEW	View permission for Transaction Instance page
IBU_PRIMARY_USER	CS_Advanced_Search	Knowledge:Search: Permission to view the KM Advanced Search Page
IBU_PRIMARY_USER	CS_Freq_Used_Sol_View	Knowledge:Search: Permission to View frequently used solutions
IBU_PRIMARY_USER	CS_Products_Add	Add New Products Not through OM
IBU_PRIMARY_USER	CS_Products_Delete	Delete product from customer view
IBU_PRIMARY_USER	CS_Products_Report	Install Base Report
IBU_PRIMARY_USER	CS_Products_Update	Change purchased product status and location
IBU_PRIMARY_USER	CS_Products_View	View Purchased Products

Role	Permission	Description
IBU_PRIMARY_USER	CS_Rec_Sol_View	Knowledge:Setup: Permission to view recommended solutions
IBU_PRIMARY_USER	CS_Solution_View	Knowledge:Search: Permission to view solution
IBU_PRIMARY_USER	CS_Solution_View_Public	Knowledge Management view public solutions
IBU_PRIMARY_USER	CS_Statement_View	Knowledge:Search: Permission to view statement
IBU_PRIMARY_USER	CS_USED_COUNT_UPDATE	Knowledge:Search: Permission to update solution used count
IBU_PRIMARY_USER	IBE_CHANGE_BILLTO_CONTACT	Permission to change the bill-to contact while placing the order for an organization
IBU_PRIMARY_USER	IBE_CREATE_RETURN	Permission to create return
IBU_PRIMARY_USER	IBE_INT_ADMINISTRATORS	Permission to view primary users of the organization
IBU_PRIMARY_USER	IBE_INT_ASSIGN_ACCOUNTS	Permission to assign accounts
IBU_PRIMARY_USER	IBE_INT_ASSIGN_ROLES	Permission to assign roles
IBU_PRIMARY_USER	IBE_INT_CONTACT_DETAILS	Permission to view contact details info
IBU_PRIMARY_USER	IBE_INT_MANAGE_CONTACT	Permission to create or update a new contact and user
IBU_PRIMARY_USER	IBE_INT_MANAGE_CONTACT_INFO	Permission to update, create, delete corporate addresses, email and phone numbers

Role	Permission	Description
IBU_PRIMARY_USER	IBE_INT_ORG_ADDRESS_BOOK	Permission to view organization address book
IBU_PRIMARY_USER	IBE_INT_ORG_DETAILS	Permission to view organization details
IBU_PRIMARY_USER	IBE_INT_ORG_EMAIL_ADDRESSES	Permission to view organization email addresses
IBU_PRIMARY_USER	IBE_INT_ORG_PHONE_NUMBERS	Permission to view organization phone number functionality
IBU_PRIMARY_USER	IBE_INT_ORG_TELEX_NUMBERS	Permission to view organization telex numbers functionality
IBU_PRIMARY_USER	IBE_INT_PENDING_APPROVAL	Permission to approve users of the organization
IBU_PRIMARY_USER	IBE_INT_PRIMARY_USER	Permission to identify a user as primary user
IBU_PRIMARY_USER	IBE_INT_ROLE_MANAGEMENT	Permission to create and update roles
IBU_PRIMARY_USER	IBE_INT_UPDATE_ORG_DETAILS	Permission to update organization details
IBU_PRIMARY_USER	IBE_INT_USER_MANAGEMENT	Permission to access user management functionality
IBU_PRIMARY_USER	IBE_VIEW_INVOICE	Permission to view invoice
IBU_PRIMARY_USER	IBE_VIEW_ORDER	Permission to view order
IBU_PRIMARY_USER	IBE_VIEW_PAYMENT	-
IBU_PRIMARY_USER	IBE_VIEW_RETURN_ORDER	Permission to view return order

Role	Permission	Description
IBU_PRIMARY_USER	IBU_CallMe	Submit a request for an agent to call back
IBU_PRIMARY_USER	IBU_Contracts_View	View Customer Contracts
IBU_PRIMARY_USER	IBU_DEPOT_VIEW	Depot Repair Orders View Permission. Used for depot repair summary, detail, and search pages.
IBU_PRIMARY_USER	IBU_Defects_View	View Product Defects
IBU_PRIMARY_USER	IBU_Homepage	-
IBU_PRIMARY_USER	IBU_Homepage_Update	IBU Homepage Update
IBU_PRIMARY_USER	IBU_Invoices_View	View Customer Invoices
IBU_PRIMARY_USER	IBU_Orders_View	View Customer Orders
IBU_PRIMARY_USER	IBU_Payments_View	View Payments
IBU_PRIMARY_USER	IBU_Profile_Update	Update profile/personalization information
IBU_PRIMARY_USER	IBU_Profile_View	View customer profile/personalization information
IBU_PRIMARY_USER	IBU_Request_Add_Contact	Add a Contact to Service Request
IBU_PRIMARY_USER	IBU_Request_Close	Close a service request
IBU_PRIMARY_USER	IBU_Request_Create	Create a service request
IBU_PRIMARY_USER	IBU_Request_Email_To_Me	Request Service Request Details by Email

Role	Permission	Description
IBU_PRIMARY_USER	IBU_Request_Escalate	Change service request urgency
IBU_PRIMARY_USER	IBU_Request_Manage_Templates	Create, Update Service Request Templates
IBU_PRIMARY_USER	IBU_Request_Manage_Views	Create, Update Service Request Views/Saved Searches.
IBU_PRIMARY_USER	IBU_Request_Reopen	Reopen a Service Request
IBU_PRIMARY_USER	IBU_Request_Search	Search Service Requests
IBU_PRIMARY_USER	IBU_Request_Update	Add a comment to an open service request
IBU_PRIMARY_USER	IBU_Request_Update_Solution_Usefulness	Update Usefulness of the Solutions Suggested for a Service Request
IBU_PRIMARY_USER	IBU_Request_View	View service requests
IBU_PRIMARY_USER	IBU_Request_View_Account	iSupport view account service requests
IBU_PRIMARY_USER	IBU_Request_View_Company	-
IBU_PRIMARY_USER	IBU_Request_View_Self	-
IBU_PRIMARY_USER	IBU_Returns_Add	Create Return for a Product
IBU_PRIMARY_USER	IBU_Returns_View	View Customer Returns
IBU_PRIMARY_USER	IBU_SR_SEND_EMAIL	permission for user to send email (Service Request)
IBU_PRIMARY_USER	IBU_SR_TASK_VIEW_PUBLISH	The permission to view only publish tasks

Role	Permission	Description
IBU_PRIMARY_USER	IBU_SR_UPLOAD_ATTACH MENT	Upload Attachment to Service Request
IBU_PRIMARY_USER	IBU_SR_VIEW_PROFILE_UP DATE	View and profile update permission
IBU_PRIMARY_USER	IBU_Survey_Create	Fill in a pre-defined survey
IBU_PRIMARY_USER	IBU_Technical_Library_View	View technical documentation
IBU_PRIMARY_USER	IBU_UPDATE_SUPPORT_PR EFERENCES	iSupport Site: Profile: Support Preferences: Update
IBU_PRIMARY_USER	IBU_VIEW_SUPPORT_PREF ERENCES	iSupport Site: Profile: Support Preferences: View
IBU_REGULAR_USER	CSI_ACCT_ACCESS_ONLY	Restricts the users access to Install Base products based on an Account
IBU_REGULAR_USER	CSI_ADDI_ATTR_UPDATE	Update permission for csi Additional Attributes page.
IBU_REGULAR_USER	CSI_ADDI_ATTR_VIEW	View permission for csi Additional Attributes page.
IBU_REGULAR_USER	CSI_CONTACT_DETAIL_UP DATE	Update permission for Contact Detail page
IBU_REGULAR_USER	CSI_CONTACT_DETAIL_VI EW	View permission for Contact Detail page
IBU_REGULAR_USER	CSI_CONTRACT_UPDATE	Update permission for Contract page
IBU_REGULAR_USER	CSI_CONTRACT_VIEW	View permission for Contract page
IBU_REGULAR_USER	CSI_CREATE_INST_UPDAT E	Update permission for Create Instance page

Role	Permission	Description
IBU_REGULAR_USER	CSI_CREATE_INST_VIEW	View permission for Create Instance page
IBU_REGULAR_USER	CSI_GENERAL_ATTRIB_CUST_ONLY	Makes certain Customer product attributes read only
IBU_REGULAR_USER	CSI_INST_CONFIG_UPDATE	Update permission for Instant Config page
IBU_REGULAR_USER	CSI_INST_CONFIG_VIEW	View permission for Instant Config page
IBU_REGULAR_USER	CSI_INST_GENERAL_UPDATE	Update permission for Instant General page
IBU_REGULAR_USER	CSI_INST_GENERAL_VIEW	View permission for Instant General page
IBU_REGULAR_USER	CSI_LATEST_TRANSACTION_UPDATE	Update permission for Latest Transaction page
IBU_REGULAR_USER	CSI_LATEST_TRANSACTION_VIEW	View permission for Latest Transaction page
IBU_REGULAR_USER	CSI_PARTY_CONTACT_UPDATE	Update permission for Party Contact page
IBU_REGULAR_USER	CSI_PARTY_CONTACT_VIEW	View permission for Party Contact page
IBU_REGULAR_USER	CSI_PERZ_EDIT_UPDATE	Update Permission for personalization edit page
IBU_REGULAR_USER	CSI_PERZ_EDIT_VIEW	View permission for personalization edit page
IBU_REGULAR_USER	CSI_PRICING_UPDATE	Update permission for Pricing page
IBU_REGULAR_USER	CSI_PRICING_VIEW	View permission for Pricing page

Role	Permission	Description
IBU_REGULAR_USER	CSI_PROPERTY_READ	Read the CSI Properties
IBU_REGULAR_USER	CSI_REPAIR_ORDER_UPDA TE	Update permission for Repair Order page
IBU_REGULAR_USER	CSI_REPAIR_ORDER_VIEW	View permission for Repair Order page
IBU_REGULAR_USER	CSI_SEARCH_PRODUCT_U PDATE	Update permission for Search Product page
IBU_REGULAR_USER	CSI_SEARCH_PRODUCT_VI EW	View permission for Search Product page
IBU_REGULAR_USER	CSI_SERVICE_REQUEST_UP DATE	Update permission for Service Request page
IBU_REGULAR_USER	CSI_SERVICE_REQUEST_VI EW	View permission for Service Request page
IBU_REGULAR_USER	CSI_SHOW_EXT_CONTACT S	Restricts Install Base User to view only the external contacts
IBU_REGULAR_USER	CSI_SHOW_EXT_LOCATIO NS	Restricts the Install Base user to view only external locations
IBU_REGULAR_USER	CSI_SHOW_EXT_PARTIES	Restricts the user to View only the External parties
IBU_REGULAR_USER	CSI_SHOW_INST_CUSTOM ER_MENU	Permission to have the Install Base Customer facing instance details Menu
IBU_REGULAR_USER	CSI_SPLIT_QUANTITY_UPD ATE	Update permission for Split Quantity page
IBU_REGULAR_USER	CSI_SPLIT_QUANTITY_VIE W	View permission for Split Quantity page

Role	Permission	Description
IBU_REGULAR_USER	CSI_TRANSACTION_DETAIL_UPDATE	Update permission for Transaction Detail page
IBU_REGULAR_USER	CSI_TRANSACTION_DETAIL_VIEW	View permission for Transaction Detail page
IBU_REGULAR_USER	CSI_TRANSACTION_INSTANCE_UPDATE	Update permission for Transaction Instance page
IBU_REGULAR_USER	CSI_TRANSACTION_INSTANCE_VIEW	View permission for Transaction Instance page
IBU_REGULAR_USER	CS_Advanced_Search	Knowledge:Search: Permission to view the KM Advanced Search Page
IBU_REGULAR_USER	CS_Freq_Used_Sol_View	Knowledge:Search: Permission to View frequently used solutions
IBU_REGULAR_USER	CS_Products_Add	Add New Products Not through OM
IBU_REGULAR_USER	CS_Products_Delete	Delete product from customer view
IBU_REGULAR_USER	CS_Products_Report	Install Base Report
IBU_REGULAR_USER	CS_Products_Update	Change purchased product status and location
IBU_REGULAR_USER	CS_Products_View	View Purchased Products
IBU_REGULAR_USER	CS_Rec_Sol_View	Knowledge:Setup: Permission to view recommended solutions
IBU_REGULAR_USER	CS_Solution_View	Knowledge:Search: Permission to view solution
IBU_REGULAR_USER	CS_Solution_View_Public	Knowledge Management view public solutions

Role	Permission	Description
IBU_REGULAR_USER	CS_Statement_View	Knowledge:Search: Permission to view statement
IBU_REGULAR_USER	CS_USED_COUNT_UPDATE	Knowledge:Search: Permission to update solution used count
IBU_REGULAR_USER	IBE_CHANGE_BILLTO_CONTACT	Permission to change the bill-to contact while placing the order for an organization
IBU_REGULAR_USER	IBE_CREATE_RETURN	Permission to create return
IBU_REGULAR_USER	IBE_VIEW_INVOICE	Permission to view invoice
IBU_REGULAR_USER	IBE_VIEW_ORDER	Permission to view order
IBU_REGULAR_USER	IBE_VIEW_PAYMENT	-
IBU_REGULAR_USER	IBE_VIEW_RETURN_ORDER	Permission to view return order
IBU_REGULAR_USER	IBU_CallMe	Submit a request for an agent to call back
IBU_REGULAR_USER	IBU_Contracts_View	View Customer Contracts
IBU_REGULAR_USER	IBU_DEPOT_VIEW	Depot Repair Orders View Permission. Used for depot repair summary, detail, and search pages.
IBU_REGULAR_USER	IBU_Defects_View	View Product Defects
IBU_REGULAR_USER	IBU_Homepage	-
IBU_REGULAR_USER	IBU_Homepage_Update	IBU Homepage Update
IBU_REGULAR_USER	IBU_Invoices_View	View Customer Invoices
IBU_REGULAR_USER	IBU_Orders_View	View Customer Orders

Role	Permission	Description
IBU_REGULAR_USER	IBU_Payments_View	View Payments
IBU_REGULAR_USER	IBU_Profile_Update	Update profile/personalization information
IBU_REGULAR_USER	IBU_Profile_View	View customer profile/personalization information
IBU_REGULAR_USER	IBU_Request_Add_Contact	Add a Contact to Service Request
IBU_REGULAR_USER	IBU_Request_Close	Close a service request
IBU_REGULAR_USER	IBU_Request_Create	Create a service request
IBU_REGULAR_USER	IBU_Request_Email_To_Me	Request Service Request Details by Email
IBU_REGULAR_USER	IBU_Request_Escalate	Change service request urgency
IBU_REGULAR_USER	IBU_Request_Manage_Templates	Create, Update Service Request Templates
IBU_REGULAR_USER	IBU_Request_Manage_Views	Create, Update Service Request Views/Saved Searches.
IBU_REGULAR_USER	IBU_Request_Reopen	Reopen a Service Request
IBU_REGULAR_USER	IBU_Request_Search	Search Service Requests
IBU_REGULAR_USER	IBU_Request_Update	Add a comment to an open service request
IBU_REGULAR_USER	IBU_Request_Update_Solution_Usefulness	Update Usefulness of the Solutions Suggested for a Service Request
IBU_REGULAR_USER	IBU_Request_View	View service requests

Role	Permission	Description
IBU_REGULAR_USER	IBU_Request_View_Account	iSupport view account service requests
IBU_REGULAR_USER	IBU_Request_View_Company	-
IBU_REGULAR_USER	IBU_Request_View_Self	-
IBU_REGULAR_USER	IBU_Returns_Add	Create Return for a Product
IBU_REGULAR_USER	IBU_Returns_View	View Customer Returns
IBU_REGULAR_USER	IBU_SR_SEND_EMAIL	permission for user to send email (Service Request)
IBU_REGULAR_USER	IBU_SR_TASK_VIEW_PUBLISH	The permission to view only publish tasks
IBU_REGULAR_USER	IBU_SR_UPLOAD_ATTACHMENT	Upload Attachment to Service Request
IBU_REGULAR_USER	IBU_SR_VIEW_PROFILE_UPDATE	View and profile update permission
IBU_REGULAR_USER	IBU_Survey_Create	Fill in a pre-defined survey
IBU_REGULAR_USER	IBU_Technical_Library_View	View technical documentation
IBU_REGULAR_USER	IBU_UPDATE_SUPPORT_PREFERENCES	iSupport Site: Profile: Support Preferences: Update
IBU_REGULAR_USER	IBU_VIEW_SUPPORT_PREFERENCES	iSupport Site: Profile: Support Preferences: View
IBU_REG_USER	CSI_ACCT_ACCESS_ONLY	Restricts the users access to Install Base products based on an Account
IBU_REG_USER	CSI_ADDI_ATTR_UPDATE	Update permission for CSI Additional Attributes page.

Role	Permission	Description
IBU_REG_USER	CSI_ADDI_ATTR_VIEW	View permission for CSI Additional Attributes page.
IBU_REG_USER	CSI_CONTACT_DETAIL_UP DATE	Update permission for Contact Detail page
IBU_REG_USER	CSI_CONTACT_DETAIL_VI EW	View permission for Contact Detail page
IBU_REG_USER	CSI_CONTRACT_UPDATE	Update permission for Contract page
IBU_REG_USER	CSI_CONTRACT_VIEW	View permission for Contract page
IBU_REG_USER	CSI_CREATE_INST_UPDAT E	Update permission for Create Instance page
IBU_REG_USER	CSI_CREATE_INST_VIEW	View permission for Create Instance page
IBU_REG_USER	CSI_GENERAL_ATTRIB_CU ST_ONLY	Makes certain Customer product attributes read only
IBU_REG_USER	CSI_INST_CONFIG_UPDAT E	Update permission for Instant Config page
IBU_REG_USER	CSI_INST_CONFIG_VIEW	View permission for Instant Config page
IBU_REG_USER	CSI_INST_GENERAL_UPDA TE	Update permission for Instant General page
IBU_REG_USER	CSI_INST_GENERAL_VIEW	View permission for Instant General page
IBU_REG_USER	CSI_LATEST_TRANSACTIO N_UPDATE	Update permission for Latest Transaction page
IBU_REG_USER	CSI_LATEST_TRANSACTIO N_VIEW	View permission for Latest Transaction page

Role	Permission	Description
IBU_REG_USER	CSI_PARTY_CONTACT_UPDATE	Update permission for Party Contact page
IBU_REG_USER	CSI_PARTY_CONTACT_VIEW	View permission for Party Contact page
IBU_REG_USER	CSI_PERZ_EDIT_UPDATE	Update Permission for personalization edit page
IBU_REG_USER	CSI_PERZ_EDIT_VIEW	View permission for personalization edit page
IBU_REG_USER	CSI_PRICING_UPDATE	Update permission for Pricing page
IBU_REG_USER	CSI_PRICING_VIEW	View permission for Pricing page
IBU_REG_USER	CSI_PROPERTY_READ	Read the CSI Properties
IBU_REG_USER	CSI_REPAIR_ORDER_UPDATE	Update permission for Repair Order page
IBU_REG_USER	CSI_REPAIR_ORDER_VIEW	View permission for Repair Order page
IBU_REG_USER	CSI_SEARCH_PRODUCT_UPDATE	Update permission for Search Product page
IBU_REG_USER	CSI_SEARCH_PRODUCT_VIEW	View permission for Search Product page
IBU_REG_USER	CSI_SERVICE_REQUEST_UPDATE	Update permission for Service Request page
IBU_REG_USER	CSI_SERVICE_REQUEST_VIEW	View permission for Service Request page
IBU_REG_USER	CSI_SHOW_EXT_CONTACTS	Restricts Install Base User to view only the external contacts

Role	Permission	Description
IBU_REG_USER	CSI_SHOW_EXT_LOCATIONS	Restricts the Install Base user to view only external locations
IBU_REG_USER	CSI_SHOW_EXT_PARTIES	Restricts the user to View only the External parties
IBU_REG_USER	CSI_SHOW_INST_CUSTOMER_MENU	Permission to have the Install Base Customer facing instance details Menu
IBU_REG_USER	CSI_SPLIT_QUANTITY_UPDATE	Update permission for Split Quantity page
IBU_REG_USER	CSI_SPLIT_QUANTITY_VIEW	View permission for Split Quantity page
IBU_REG_USER	CSI_TRANSACTION_DETAIL_UPDATE	Update permission for Transaction Detail page
IBU_REG_USER	CSI_TRANSACTION_DETAIL_VIEW	View permission for Transaction Detail page
IBU_REG_USER	CSI_TRANSACTION_INSTANCE_UPDATE	Update permission for Transaction Instance page
IBU_REG_USER	CSI_TRANSACTION_INSTANCE_VIEW	View permission for Transaction Instance page
IBU_REG_USER	CS_Advanced_Search	Knowledge:Search: Permission to view the KM Advanced Search Page
IBU_REG_USER	CS_Freq_Used_Sol_View	Knowledge:Search: Permission to View frequently used solutions
IBU_REG_USER	CS_Products_Add	Add New Products Not through OM
IBU_REG_USER	CS_Products_Delete	Delete product from customer view

Role	Permission	Description
IBU_REG_USER	CS_Products_Report	Install Base Report
IBU_REG_USER	CS_Products_Update	Change purchased product status and location
IBU_REG_USER	CS_Products_View	View Purchased Products
IBU_REG_USER	CS_Rec_Sol_View	Knowledge:Setup: Permission to view recommended solutions
IBU_REG_USER	CS_Solution_View	Knowledge:Search: Permission to view solution
IBU_REG_USER	CS_Solution_View_Public	Knowledge Management view public solutions
IBU_REG_USER	CS_Statement_View	Knowledge:Search: Permission to view statement
IBU_REG_USER	CS_USED_COUNT_UPDATE	Knowledge:Search: Permission to update solution used count
IBU_REG_USER	IBE_CHANGE_BILLTO_CONTACT	Permission to change the bill-to contact while placing the order for an organization
IBU_REG_USER	IBE_CREATE_RETURN	Permission to create return
IBU_REG_USER	IBE_VIEW_INVOICE	Permission to view invoice
IBU_REG_USER	IBE_VIEW_ORDER	Permission to view order
IBU_REG_USER	IBE_VIEW_PAYMENT	-
IBU_REG_USER	IBE_VIEW_RETURN_ORDER	Permission to view return order
IBU_REG_USER	IBU_CallMe	Submit a request for an agent to call back

Role	Permission	Description
IBU_REG_USER	IBU_Contracts_View	View Customer Contracts
IBU_REG_USER	IBU_DEPOT_VIEW	Depot Repair Orders View Permission. Used for depot repair summary, detail, and search pages.
IBU_REG_USER	IBU_Defects_View	View Product Defects
IBU_REG_USER	IBU_Homepage	-
IBU_REG_USER	IBU_Homepage_Update	IBU Homepage Update
IBU_REG_USER	IBU_Invoices_View	View Customer Invoices
IBU_REG_USER	IBU_Orders_View	View Customer Orders
IBU_REG_USER	IBU_Payments_View	View Payments
IBU_REG_USER	IBU_Profile_Update	Update profile/personalization information
IBU_REG_USER	IBU_Profile_View	View customer profile/personalization information
IBU_REG_USER	IBU_Request_Add_Contact	Add a Contact to Service Request
IBU_REG_USER	IBU_Request_Close	Close a service request
IBU_REG_USER	IBU_Request_Create	Create a service request
IBU_REG_USER	IBU_Request_Email_To_Me	Request Service Request Details by Email
IBU_REG_USER	IBU_Request_Escalate	Change service request urgency

Role	Permission	Description
IBU_REG_USER	IBU_Request_Manage_Templates	Create, Update Service Request Templates
IBU_REG_USER	IBU_Request_Manage_Views	Create, Update Service Request Views/Saved Searches.
IBU_REG_USER	IBU_Request_Reopen	Reopen a Service Request
IBU_REG_USER	IBU_Request_Search	Search Service Requests
IBU_REG_USER	IBU_Request_Update	Add a comment to an open service request
IBU_REG_USER	IBU_Request_Update_Solution_Usefulness	Update Usefulness of the Solutions Suggested for a Service Request
IBU_REG_USER	IBU_Request_View	View service requests
IBU_REG_USER	IBU_Request_View_Self	-
IBU_REG_USER	IBU_Returns_Add	Create Return for a Product
IBU_REG_USER	IBU_Returns_View	View Customer Returns
IBU_REG_USER	IBU_SR_SEND_EMAIL	permission for user to send email (Service Request)
IBU_REG_USER	IBU_SR_TASK_VIEW_PUBLISH	The permission to view only publish tasks
IBU_REG_USER	IBU_SR_UPLOAD_ATTACHMENT	Upload Attachment to Service Request
IBU_REG_USER	IBU_SR_VIEW_PROFILE_UPDATE	View and profile update permission
IBU_REG_USER	IBU_Survey_Create	Fill in a predefined survey

Role	Permission	Description
IBU_REG_USER	IBU_Technical_Library_View	View technical documentation
IBU_SELF_SERVICE_HELPD ESK		
IBU_SYSTEM_ADMIN	CS_Advanced_Search	Knowledge:Search: Permission to view the KM Advanced Search Page
IBU_SYSTEM_ADMIN	CS_Assoc_Ext_Obj_To_Sol	Knowledge:Authoring: Permission to associate external object to solution
IBU_SYSTEM_ADMIN	CS_Assoc_Ext_Obj_To_Stmt	Knowledge:Authoring: Permission to associate external object to statement
IBU_SYSTEM_ADMIN	CS_Categories_Update	Knowledge:Setup: Permission to update solution categories
IBU_SYSTEM_ADMIN	CS_Categories_View	Knowledge:Setup: Permission to view solution categories setup pages
IBU_SYSTEM_ADMIN	CS_EMPLOYEE_CONTACT_ ADD	Permission to add an Employee as a contact for a Customer product
IBU_SYSTEM_ADMIN	CS_Freq_Used_Def_Update	Knowledge:Setup: Permission to update frequently used solution definitions
IBU_SYSTEM_ADMIN	CS_Freq_Used_Def_View	Knowledge:Setup: Permission to view frequently used solution definitions
IBU_SYSTEM_ADMIN	CS_PROPERTY_UPDATE	CS Property Update
IBU_SYSTEM_ADMIN	CS_Personal_Profile_Update	Knowledge:Other: Permission to update Knowledge Management Personal Profile

Role	Permission	Description
IBU_SYSTEM_ADMIN	CS_Products_Add	Add New Products Not through OM
IBU_SYSTEM_ADMIN	CS_Products_Delete	Delete product from customer view
IBU_SYSTEM_ADMIN	CS_Products_Report	Install Base Report
IBU_SYSTEM_ADMIN	CS_Products_Update	Change purchased product status and location
IBU_SYSTEM_ADMIN	CS_Products_View	View Purchased Products
IBU_SYSTEM_ADMIN	CS_Rec_Sol_Update	Knowledge:Setup: Permission to update recommended solutions
IBU_SYSTEM_ADMIN	CS_Sol_Auth_Profile_Update	Knowledge:Authoring: Permission to update solution authoring profile
IBU_SYSTEM_ADMIN	CS_Solution_Comments_Add	Knowledge:Authoring: Permission to add solution comments
IBU_SYSTEM_ADMIN	CS_Solution_Create	Knowledge:Authoring: Permission to create solution
IBU_SYSTEM_ADMIN	CS_Solution_Delete	Knowledge:Authoring: Permission to delete solution
IBU_SYSTEM_ADMIN	CS_Solution_Get_Lock	Knowledge:Authoring: Permission to get solution lock from user
IBU_SYSTEM_ADMIN	CS_Solution_Update	Knowledge:Authoring: Permission to update solution
IBU_SYSTEM_ADMIN	CS_Solution_View_Restricted	Knowledge:Search: Permission to view public, internal, and restricted solutions

Role	Permission	Description
IBU_SYSTEM_ADMIN	CS_Statement_Create	Knowledge:Authoring: Permission to create statement
IBU_SYSTEM_ADMIN	CS_Statement_Delete	Knowledge:Authoring: Permission to delete statement
IBU_SYSTEM_ADMIN	CS_Statement_Global_Update	Knowledge:Authoring: Permission to update Statements globally
IBU_SYSTEM_ADMIN	CS_Statement_Update	Knowledge:Authoring: Permission to update statement
IBU_SYSTEM_ADMIN	CS_Types_Edit	Knowledge:Setup: Permission to edit solution and statement types
IBU_SYSTEM_ADMIN	CS_Types_View	Knowledge:Setup: Permission to view solution and statement types setup pages
IBU_SYSTEM_ADMIN	CS_Workflow_Setup_Update	Knowledge:Setup: Permission to update solution authoring workflow setup
IBU_SYSTEM_ADMIN	CS_Workflow_Setup_View	Knowledge:Setup: Permission to view solution authoring Workflow setup pages
IBU_SYSTEM_ADMIN	IBE_CHANGE_BILLTO_CONTACT	Permission to change the bill-to contact while placing the order for an organization
IBU_SYSTEM_ADMIN	IBE_CREATE_RETURN	Permission to create return
IBU_SYSTEM_ADMIN	IBE_VIEW_INVOICE	Permission to view invoice
IBU_SYSTEM_ADMIN	IBE_VIEW_ORDER	Permission to view order

Role	Permission	Description
IBU_SYSTEM_ADMIN	IBE_VIEW_PAYMENT	-
IBU_SYSTEM_ADMIN	IBE_VIEW_RETURN_ORDER	Permission to view return order
IBU_SYSTEM_ADMIN	IBU_ADMIN_UPDATE	IBU ADMIN UPDATE
IBU_SYSTEM_ADMIN	IBU_ADMIN_VIEW	IBU ADMIN VIEW
IBU_SYSTEM_ADMIN	IBU_Account_Create	To Create an Account to a party or organization
IBU_SYSTEM_ADMIN	IBU_Call_Me_Edit	Edit call me
IBU_SYSTEM_ADMIN	IBU_Category_Edit	Edit category
IBU_SYSTEM_ADMIN	IBU_DEPOT_VIEW	Depot Repair Orders View Permission. Used for depot repair summary, detail, and search pages.
IBU_SYSTEM_ADMIN	IBU_Personalized_Homepage _Edit	Edit personalized homepage
IBU_SYSTEM_ADMIN	IBU_Request_Management_E dit	Edit request management
IBU_SYSTEM_ADMIN	IBU_Subscription_Edit	Edit subscriptions
IBU_SYSTEM_ADMIN	IBU_Survey_Create	Fill in a pre-defined survey
IBU_SYSTEM_ADMIN	IBU_Survey_Import	Import survey
IBU_SYSTEM_ADMIN	IBU_TEMPLATE_MANAGE MENT	Permission for template Service Request
IBU_SYSTEM_ADMIN	IBU_USER_MGMT	Permission for User Management
IBU_SYSTEM_ADMIN	IBU_USER_MGMT_VIEW_A LL_ROLE	Permission to view all roles

Role	Permission	Description
IBU_SYSTEM_ADMIN	IBU_USER_MGMT_VIEW_ALL_USER	Permission to view all users
IBU_SYSTEM_ADMIN	IBU_USER_MGMT_VIEW_COMPANY_USER	Permission to view company user
IBU_SYSTEM_ADMIN	IBU_USER_MGMT_VIEW_MY_ROLE	Permission to view only my role
IBU_SYSTEM_ADMIN	IBU_User_Group_Edit	Edit user group
IBU_SYSTEM_ADMIN	JTF_DAC_Maintain	Maintain Data Access Control
IBU_SYSTEM_ADMIN	JTF_REG_APPROVAL	-
IBU_SYSTEM_ADMIN	JTF_SECURITY_ASSIGN_ROLE	Permission to assign roles

Configurability

Functions and Variables for Page-Level Configurability

Functions for Page-Level Configurability

The tables in this section list the functions that are used to place your customized Java service pages (JSPs) around content pages that Oracle supplies. With these functions, you can configure the high-level look and feel of yourOracle iSupport web pages. The end of function names relates to the placement of a customized JSP on an Oracle content page as follows:

- TOP means that a customized JSP will go at the top of the content page.

- LEFT means that a customized JSP will go at the left of the content page.

- RIGHT means that a customized JSP will go at the right of the content page.

- BOTTOM means that a customized JSP will go at the bottom of the content page.

All functions initially point to a dummy JSP page, gen_ibuConfigHolder.jsp.

The following table shows the initial list of configuration functions.

Functions to Configure the Look and Feel of Oracle Content Pages

Name of Oracle Content Page	Associated Function Name
Active Conferences	IBU_OWC_SUMMARY_SECTION_TOP IBU_OWC_SUMMARY_SECTION_LEFT IBU_OWC_SUMMARY_SECTION_RIGHT IBU_OWC_SUMMARY_SECTION_BOTTOM
Contact Us (Call Me)	IBU_CALLBACK_SECTION_TOP IBU_CALLBACK_SECTION_LEFT IBU_CALLBACK_SECTION_RIGHT IBU_CALLBACK_SECTION_BOTTOM
Create Service Request Confirmation	IBU_SR_CNFG_CREATE_CNFM_TOP IBU_SR_CNFG_CREATE_CNFM_LEFT IBU_SR_CNFG_CREATE_CNFM_RIGHT IBU_SR_CNFG_CREATE_CNFM_BOTTOM
Create Service Request First Page	IBU_SR_CNFG_CREATE_MAIN_TOP IBU_SR_CNFG_CREATE_MAIN_LEFT IBU_SR_CNFG_CREATE_MAIN_RIGHT IBU_SR_CNFG_CREATE_MAIN_BOTTOM
Create Service Request Template Page	IBU_SR_CNFG_CREATE_TMPL_TOP IBU_SR_CNFG_CREATE_TMPL_LEFT IBU_SR_CNFG_CREATE_TMPL_RIGHT IBU_SR_CNFG_CREATE_TMPL_BOTTOM
Create Service Request Verification	IBU_SR_CNFG_CREATE_VRFY_TOP IBU_SR_CNFG_CREATE_VRFY_LEFT IBU_SR_CNFG_CREATE_VRFY_RIGHT IBU_SR_CNFG_CREATE_VRFY_BOTTOM
Home Page	IBU_HOME_SECTION_TOP IBU_HOME_SECTION_LEFT IBU_HOME_SECTION_RIGHT IBU_HOME_SECTION_BOTTOM
Invoice Detail	IBU_INVDT_SECTION_TOP IBU_INVDT_SECTION_LEFT IBU_INVDT_SECTION_RIGHT IBU_INVDT_SECTION_BOTTOM

Name of Oracle Content Page	Associated Function Name
Invoice Payment	IBU_INVPT_SECTION_LEFT IBU_INVPT_SECTION_RIGHT IBU_INVPT_SECTION_TOP IBU_INVPT_SECTION_BOTTOM
Invoice Summary	IBU_INVSU_SECTION_TOP IBU_INVSU_SECTION_LEFT IBU_INVSU_SECTION_RIGHT IBU_INVSU_SECTION_BOTTOM
Knowledge Management Browse	CS_KB_BROWSE_TOP_FN CS_KB_BROWSE_LEFT_FN CS_KB_BROWSE_RIGHT_FN CS_KB_BROWSE_BOTTOM_FN Refer to *OracleKnowledge Management Implementation and Administration Guide* for details on using these functions.
Knowledge Management Search Result	CS_KB_SEARCH_RESULT_TOP_FN CS_KB_SEARCH_RESULT_LEFT_FN CS_KB_SEARCH_RESULT_RIGHT_FN CS_KB_SEARCH_RESULT_BOTTOM_FN Refer to *OracleKnowledge Management Implementation and Administration Guide* for details on using these functions.
Knowledge Management Solution Detail	CS_KB_SOLN_DETAIL_TOP_FN CS_KB_SOLN_DETAIL_LEFT_FN CS_KB_SOLN_DETAIL_RIGHT_FN CS_KB_SOLN_DETAIL_BOTTOM_FN Refer to *OracleKnowledge Management Implementation and Administration Guide* for details on using these functions.
Line Details (from the Order Details page)	IBU_ORDERLD_SECTION_TOP IBU_ORDERLD_SECTION_LEFT IBU_ORDERLD_SECTION_RIGHT IBU_ORDERLD_SECTION_BOTTOM

Name of Oracle Content Page	Associated Function Name
Order Details	IBU_ORDERDT_SECTION_TOP IBU_ORDERDT_SECTION_LEFT IBU_ORDERDT_SECTION_RIGHT IBU_ORDERDT_SECTION_BOTTOM
Order Shipment	IBU_ORDERSH_SECTION_LEFT IBU_ORDERSH_SECTION_RIGHT IBU_ORDERSH_SECTION_TOP IBU_ORDERSH_SECTION_BOTTOM
Order Summary	IBU_ORDERSU_SECTION_TOP IBU_ORDERSU_SECTION_LEFT IBU_ORDERSU_SECTION_RIGHT IBU_ORDERSU_SECTION_BOTTOM
Payment Detail	IBU_PAYDT_SECTION_LEFT IBU_PAYDT_SECTION_RIGHT IBU_PAYDT_SECTION_TOP IBU_PAYDT_SECTION_BOTTOM
Payment Summary	IBU_PAYSU_SECTION_TOP IBU_PAYSU_SECTION_LEFT IBU_PAYSU_SECTION_RIGHT IBU_PAYSU_SECTION_BOTTOM
Return Confirmation	IBU_RETCONF_SECTION_TOP IBU_RETCONF_SECTION_LEFT IBU_RETCONF_SECTION_RIGHT IBU_RETCONF_SECTION_BOTTOM
Return Creation	IBU_RETCRT_SECTION_TOP IBU_RETCRT_SECTION_LEFT IBU_RETCRT_SECTION_RIGHT IBU_RETCRT_SECTION_BOTTOM
Return Detail	IBU_RETDET_SECTION_TOP IBU_RETDET_SECTION_LEFT IBU_RETDET_SECTION_RIGHT IBU_RETDET_SECTION_BOTTOM
Return Search	IBU_RETSRCH_SECTION_TOP IBU_RETSRCH_SECTION_LEFT IBU_RETSRCH_SECTION_RIGHT IBU_RETSRCH_SECTION_BOTTOM

Name of Oracle Content Page	Associated Function Name
Return Summary	IBU_RETSUM_SECTION_TOP IBU_RETSUM_SECTION_LEFT IBU_RETSUM_SECTION_RIGHT IBU_RETSUM_SECTION_BOTTOM
Service Request Details	IBU_SR_CNFG_DETAILS_TOP IBU_SR_CNFG_DETAILS_LEFT IBU_SR_CNFG_DETAILS_RIGHT IBU_SR_CNFG_DETAILS_BOTTOM
Service Request Search	IBU_SR_CNFG_SEARCH_TOP IBU_SR_CNFG_SEARCH_LEFT IBU_SR_CNFG_SEARCH_RIGHT IBU_SR_CNFG_SEARCH_BOTTOM
Service Request Summary	IBU_SR_CNFG_SUMMARY_TOP IBU_SR_CNFG_SUMMARY_LEFT IBU_SR_CNFG_SUMMARY_RIGHT IBU_SR_CNFG_SUMMARY_BOTTOM
Technical Library	IBU_TECHLIB_SECTION_TOP IBU_TECHLIB_SECTION_LEFT IBU_TECHLIB_SECTION_RIGHT IBU_TECHLIB_SECTION_BOTTOM

The following table augments the content of the previous one with more functions.

More Functions to Configure the Look and Feel of Oracle iSupport Content Pages

Name of Oracle Content Page	Associated Function Name
Add/Update Service Request Contacts: Bottom	IBU_SR_CNFG_DTL_CONTACT_BOTTOM
Add/Update Service Request Contacts: Left	IBU_SR_CNFG_DTL_CONTACT_LEFT
Add/Update Service Request Contacts: Right	IBU_SR_CNFG_DTL_CONTACT_RIGHT
Add/Update Service Request Contacts: Top	IBU_SR_CNFG_DTL_CONTACT_TOP
Close Service Request: Bottom	IBU_SR_CNFG_DTL_CLOSE_BOTTOM

Name of Oracle Content Page	Associated Function Name
Close Service Request: Left	IBU_SR_CNFG_DTL_CLOSE_LEFT
Close Service Request: Right	IBU_SR_CNFG_DTL_CLOSE_RIGHT
Close Service Request: Top	IBU_SR_CNFG_DTL_CLOSE_TOP
Create Service Request Contact Information: Bottom	IBU_SR_CNFG_CREATE_CI_BOTTOM
Create Service Request Contact Information: Left	IBU_SR_CNFG_CREATE_CI_LEFT
Create Service Request Contact Information: Right	IBU_SR_CNFG_CREATE_CI_RIGHT
Create Service Request Contact Information: Top	IBU_SR_CNFG_CREATE_CI_TOP
Create Service Request Request Type Selection: Bottom	IBU_SR_CNFG_CREATE_TYPE_BOTTOM
Create Service Request Request Type Selection: Left	IBU_SR_CNFG_CREATE_TYPE_LEFT
Create Service Request Request Type Selection: Right	IBU_SR_CNFG_CREATE_TYPE_RIGHT
Create Service Request Request Type Selection: Top	IBU_SR_CNFG_CREATE_TYPE_TOP
Create Service Request Template Request Type Selection: Bottom	IBU_SR_CNFG_TEMP_TYPE_BOTTOM
Create Service Request Template Request Type Selection: Left	IBU_SR_CNFG_TEMP_TYPE_LEFT
Create Service Request Template Request Type Selection: Right	IBU_SR_CNFG_TEMP_TYPE_RIGHT
Create Service Request Template Request Type Selection: Top	IBU_SR_CNFG_TEMP_TYPE_TOP

Name of Oracle Content Page	Associated Function Name
Create Service Request Template: Bottom	IBU_SR_CNFG_TEMP_CREATE_BOTTOM
Create Service Request Template: Left	IBU_SR_CNFG_TEMP_CREATE_LEFT
Create Service Request Template: Right	IBU_SR_CNFG_TEMP_CREATE_RIGHT
Create Service Request Template: Top	IBU_SR_CNFG_TEMP_CREATE_TOP
Create Service Request View: Bottom	IBU_SR_CNFG_VW_CREATE_BOTTOM
Create Service Request View: Left	IBU_SR_CNFG_VW_CREATE_LEFT
Create Service Request View: Right	IBU_SR_CNFG_VW_CREATE_RIGHT
Create Service Request View: Top	IBU_SR_CNFG_VW_CREATE_TOP
Depot Details: Bottom	IBU_DEPOTDT_SECTION_BOTTOM
Depot Details: Left	IBU_DEPOTDT_SECTION_LEFT
Depot Details: Right	IBU_DEPOTDT_SECTION_RIGHT
Depot Details: Top	IBU_DEPOTDT_SECTION_TOP
Depot Search: Bottom	IBU_DEPOTSRCH_SECTION_BOTTOM
Depot Search: Left	IBU_DEPOTSRCH_SECTION_LEFT
Depot Search: Right	IBU_DEPOTSRCH_SECTION_RIGHT
Depot Search: Top	IBU_DEPOTSRCH_SECTION_TOP
Depot Summary: Left	IBU_DEPOTSU_SECTION_LEFT
Depot Summary: Bottom	IBU_DEPOTSU_SECTION_BOTTOM
Depot Summary: Right	IBU_DEPOTSU_SECTION_RIGHT
Depot Summary: Top	IBU_DEPOTSU_SECTION_TOP

Name of Oracle Content Page	Associated Function Name
Order Details: Line Billing Details: Bottom	IBU_SHIP_LINEBILL_DTL_BOTTOM
Order Details: Line Billing Details: Left	IBU_SHIP_LINEBILL_DTL_LEFT
Order Details: Line Billing Details: Right	IBU_SHIP_LINEBILL_DTL_RIGHT
Order Details: Line Billing Details: Top	IBU_SHIP_LINEBILL_DTL_TOP
Order Details: Line Shipping Details: Bottom	IBU_SHIP_LINESHP_DTL_BOTTOM
Order Details: Line Shipping Details: Left	IBU_SHIP_LINESHP_DTL_LEFT
Order Details: Line Shipping Details: Right	IBU_SHIP_LINESHP_DTL_RIGHT
Order Details: Line Shipping Details: Top	IBU_SHIP_LINESHP_DTL_TOP
Reopen Service Request: Bottom	IBU_SR_CNFG_DTL_REOPEN_BOTTOM
Reopen Service Request: Left	IBU_SR_CNFG_DTL_REOPEN_LEFT
Reopen Service Request: Right	IBU_SR_CNFG_DTL_REOPEN_RIGHT
Reopen Service Request: Top	IBU_SR_CNFG_DTL_REOPEN_TOP
Returns: Billing Details Page For B2B customer: Bottom	IBU_RET_BILLDTL_BOTTOM
Returns: Billing Details Page For B2B customer: Left	IBU_RET_BILLDTL_LEFT
Returns: Billing Details Page For B2B customer: Right	IBU_RET_BILLDTL_RIGHT
Returns: Billing Details Page For B2B customer: Top	IBU_RET_BILLDTL_TOP
Returns: Review and Submit Page: Bottom	IBU_RET_REVIEW_BOTTOM
Returns: Review and Submit Page: Left	IBU_RET_REVIEW_LEFT

Name of Oracle Content Page	Associated Function Name
Returns: Review and Submit Page: Right	IBU_RET_REVIEW_RIGHT
Returns: Review and Submit Page: Top	IBU_RET_REVIEW_TOP
Returns: Search & Select item (Multi Order Flow): Bottom	IBU_RET_CREMULTI_ORD_BOTTOM
Returns: Search & Select item (Multi Order Flow): Left	IBU_RET_CREMULTI_ORD_LEFT
Returns: Search & Select item (Multi Order Flow): Right	IBU_RET_CREMULTI_ORD_RIGHT
Returns: Search & Select item (Multi Order Flow): Top	IBU_RET_CREMULTI_ORD_TOP
Returns: Select Items (Single Order Flow): Bottom	IBU_RET_CRESINGLE_ORD_BOTTOM
Returns: Select Items (Single Order Flow): Left	IBU_RET_CRESINGLE_ORD_LEFT
Returns: Select Items (Single Order Flow): Right	IBU_RET_CRESINGLE_ORD_RIGHT
Returns: Select Items (Single Order Flow): Top	IBU_RET_CRESINGLE_ORD_TOP
Returns: View Address Main Page: Bottom	IBU_RET_ADDRESS_BOTTOM
Returns: View Address Main Page: Left	IBU_RET_ADDRESS_LEFT
Returns: View Address Main Page: Right	IBU_RET_ADDRESS_RIGHT
Returns: View Address Main Page: Top	IBU_RET_ADDRESS_TOP
Returns: View Contacts Main Page: Bottom	IBU_RET_CONTACT_BOTTOM
Returns: View Contacts Main Page: Left	IBU_RET_CONTACT_LEFT
Returns: View Contacts Main Page: Right	IBU_RET_CONTACT_RIGHT
Returns: View Contacts Main Page: Top	IBU_RET_CONTACT_TOP

Name of Oracle Content Page	Associated Function Name
Service Request Request Escalation: Bottom	IBU_SR_CNFG_DTL_ESC_BOTTOM
Service Request Request Escalation: Left	IBU_SR_CNFG_DTL_ESC_LEFT
Service Request Request Escalation: Right	IBU_SR_CNFG_DTL_ESC_RIGHT
Service Request Request Escalation: Top	IBU_SR_CNFG_DTL_ESC_TOP
Service Request Solution Detail: Bottom	IBU_SR_CNFG_SOL_DETAIL_BOTTOM
Service Request Solution Detail: Left	IBU_SR_CNFG_SOL_DETAIL_LEFT
Service Request Solution Detail: Right	IBU_SR_CNFG_SOL_DETAIL_RIGHT
Service Request Solution Detail: Top	IBU_SR_CNFG_SOL_DETAIL_TOP
Service Request Suggested Solutions: Bottom	IBU_SR_CNFG_SUG_SOL_BOTTOM
Service Request Suggested Solutions: Left	IBU_SR_CNFG_SUG_SOL_LEFT
Service Request Suggested Solutions: Right	IBU_SR_CNFG_SUG_SOL_RIGHT
Service Request Suggested Solutions: Top	IBU_SR_CNFG_SUG_SOL_TOP
Service Request Template Summary: Bottom	IBU_SR_CNFG_TEMP_SUMM_BOTTOM
Service Request Template Summary: Left	IBU_SR_CNFG_TEMP_SUMM_LEFT
Service Request Template Summary: Right	IBU_SR_CNFG_TEMP_SUMM_RIGHT
Service Request Template Summary: Top	IBU_SR_CNFG_TEMP_SUMM_TOP
Service Request View Summary: Bottom	IBU_SR_CNFG_VW_SUMMARY_BOTTOM
Service Request View Summary: Left	IBU_SR_CNFG_VW_SUMMARY_LEFT
Service Request View Summary: Right	IBU_SR_CNFG_VW_SUMMARY_RIGHT
Service Request View Summary: Top	IBU_SR_CNFG_VW_SUMMARY_TOP

Name of Oracle Content Page	Associated Function Name
Shipment Details for Shipment Number: Bottom	IBU_SHIP_DLVY_DTL_BOTTOM
Shipment Details for Shipment Number: Left	IBU_SHIP_DLVY_DTL_LEFT
Shipment Details for Shipment Number: Right	IBU_SHIP_DLVY_DTL_RIGHT
Shipment Details for Shipment Number: Top	IBU_SHIP_DLVY_DTL_TOP
Site Selection: Bottom	IBU_H_SITE_SECTION_BOTTOM
Site Selection: Left	IBU_H_SITE_SECTION_LEFT
Site Selection: Right	IBU_H_SITE_SECTION_RIGHT
Site Selection: Top	IBU_H_SITE_SECTION_TOP
Survey: Bottom	IBU_SURVEYSU_SECTION_BOTTOM
Survey: Left	IBU_SURVEYSU_SECTION_LEFT
Survey: Right	IBU_SURVEYSU_SECTION_RIGHT
Survey: Top	IBU_SURVEYSU_SECTION_TOP
Technical Library Download: Bottom	IBU_TECHLIB_D_SECTION_BOTTOM
Technical Library Download: Left	IBU_TECHLIB_D_SECTION_LEFT
Technical Library Download: Right	IBU_TECHLIB_D_SECTION_RIGHT
Technical Library Download: Top	IBU_TECHLIB_D_SECTION_TOP
Technical Library Search: Bottom	IBU_TECHLIB_S_SECTION_BOTTOM
Technical Library Search: Left	IBU_TECHLIB_S_SECTION_LEFT
Technical Library Search: Right	IBU_TECHLIB_S_SECTION_RIGHT
Technical Library Search: Top	IBU_TECHLIB_S_SECTION_TOP

Name of Oracle Content Page	Associated Function Name
Update Service Request Template: Bottom	IBU_SR_CNFG_TEMP_UPDATE_BOTTOM
Update Service Request Template: Left	IBU_SR_CNFG_TEMP_UPDATE_LEFT
Update Service Request Template: Right	IBU_SR_CNFG_TEMP_UPDATE_RIGHT
Update Service Request Template:Top	IBU_SR_CNFG_TEMP_UPDATE_TOP
Update Service Request View: Bottom	IBU_SR_CNFG_VW_UPDATE_BOTTOM
Update Service Request View: Left	IBU_SR_CNFG_VW_UPDATE_LEFT
Update Service Request View: Right	IBU_SR_CNFG_VW_UPDATE_RIGHT
Update Service Request View: Top	IBU_SR_CNFG_VW_UPDATE_TOP

Variables for Page-Level Configurability

The table in this section lists the variables that are available to use in your customized Java service pages (JSPs). The variables provide access to elements of the content that Oracle supplies.

Context Variables Available for Custom JSPs

Context Variable for a Logged-In User	Java Method to Retrieve the Context Variable
UserID	((Long)pageContext.getAttribute ("ibuConfigUserID", PageContext.REQUEST_SCOPE))
RespID id	((Long)pageContext.getAttribute ("ibuConfigRespID",PageContext.REQUEST_SCOPE))
AppID id	((Long)pageContext.getAttribute ("ibuConfigAppID", PageContext.REQUEST_SCOPE))

Context Variable for a Logged-In User	Java Method to Retrieve the Context Variable
RespAppID	((Long)pageContext.getAttribute ("ibuConfigRespAppID", PageContext.REQUEST_SCOPE))
CustomerID	((Long)pageContext.getAttribute ("ibuConfigCustomerID", PageContext.REQUEST_SCOPE))
CompanyID	((Long)pageContext.getAttribute ("ibuConfigCompanyID", PageContext.REQUEST_SCOPE))
CompanyName	(String)pageContext.getAttribute ("ibuConfigCompanyName", PageContext.REQUEST_SCOPE
UserName	(String)pageContext.getAttribute ("ibuConfigUserName", PageContext.REQUEST_SCOPE))
FirstName	(String)pageContext.getAttribute ("ibuConfigFirstName", PageContext.REQUEST_SCOPE))
LastName	(String)pageContext.getAttribute ("ibuConfigLastName", PageContext.REQUEST_SCOPE))
user session	((oracle.apps.jtf.base.session.FWSession)page Context.getAttribute ("ibuConfigFWSession", PageContext.REQUEST_SCOPE))
AppsContext	((oracle.apps.jtf.base.session.FWAppsContext) pageContext.getAttribute ("ibuConfigFWAppsContext", PageContext.REQUEST_SCOPE)).
Connection	((oracle.apps.jtf.base.session.FWAppsContext) pageContext.getAttribute ("ibuConfigFWAppsContext", PageContext.REQUEST_SCOPE)).getConnecti on()

Service Request

Seeded Configurable Pages

The following table lists the Oracle iSupport configurable service request pages and their associated top-level regions. Use this table in conjunction with the utility UI, which lists the attributes for top-level regions.

Oracle iSupport Top-Level Regions for Service Request Pages

Page Name	Code for Top-Level Region
Close Service Request	IBU_CF_SR_CLOSE
Create Service Request Template	IBU_CF_SR_TEMP_CREATE_TEMPLATE
Create Service Request Template: Additional Contacts	IBU_CF_SR_TEMP_ADDL_CONTACTS
Create Service Request Template: Select Request	IBU_CF_SR_TEMP_TYPE_SELECTION
Create Service Request View	IBU_CF_SR_VW_CREATE
Create Service Request: Additional Contacts	IBU_CF_SR_ADDITIONAL_CONTACTS
Create Service Request: Confirmation	IBU_CF_SR_CR_CONFIRMATION
Create Service Request: Contact Information	IBU_CF_SR_CR_CONTACT_INFO
Create Service Request: Identify Problem	IBU_CF_SR_CR_IDENTIFY_PROBLEM
Create Service Request: Problem Details	IBU_CF_SR_CR_PROBLEM_DETAILS
Create Service Request: Problem Resolved	IBU_CF_SR_PROBLEM_RESOLVED
Create Service Request: Review	IBU_CF_SR_CR_REVIEW
Create Service Request: Select Request Type	IBU_CF_SR_CR_TYPE_SELECTION
Create Service Request: Suggested Solutions	IBU_CF_SR_SUGGESTED_SOLUTIONS
Delete/Remove Confirmation	IBU_CF_SR_REMOVE_CONFIRMATION

Page Name	Code for Top-Level Region
Edit Service Request Quick Link	IBU_CF_SR_VW_QL_UPDATE
Field Level Help	IBU_CF_SR_FIELD_LEVEL_HELP
List of Values: All Products	IBU_CF_SR_LOV_ALL_PRODUCTS
List of Values: Bill To Address	IBU_CF_SR_LOV_BILL_TO_ADDRESS
List of Values: Bill To Contact	IBU_CF_SR_LOV_BILL_TO_CONTACT
List of Values: Contact Points	IBU_CF_SR_LOV_CONTACT_POINTS
List of Values: Contacts	IBU_CF_SR_LOV_CONTACTS
List of Values: Incident Address	IBU_CF_SR_LOV_INCIDENT_ADDRESS
List of Values: Installed At Address	IBU_CF_SR_LOV_INSTALL_ADDRESS
List of Values: Problem Type	IBU_CF_SR_LOV_PROBLEM_TYPE
List of Values: Product Version	IBU_CF_SR_LOV_PROD_VERSION
List of Values: Registered Products	IBU_CF_SR_LOV_REG_PRODUCTS
List of Values: Ship To Address	IBU_CF_SR_LOV_SHIP_TO_ADDRESS
List of Values: Ship To Contact	IBU_CF_SR_LOV_SHIP_TO_CONTACT
Reopen Service Request	IBU_CF_SR_REOPEN
Search Service Request	IBU_CF_SR_VW_SEARCH
Service Request Details	IBU_CF_SR_DETAILS
Service Request Escalation Request	IBU_CF_SR_REQUEST_ESCALATION
Service Request Summary	IBU_CF_SR_SUMMARY
Service Request Template Summary	IBU_CF_SR_TEMP_SUMMARY

Page Name	Code for Top-Level Region
Service Request View Summary	IBU_CF_SR_VW_SUMMARY
Service Request: Add Contact	IBU_CF_SR_ADD_CONTACT
Service Request: Update Contact	IBU_CF_SR_UPDATE_CONTACT
Solution Details (During Create Service Request)	IBU_CF_SR_CR_SOLUTION_DETAIL
Solution Details (Linked to Service Request)	IBU_CF_SR_SOLUTION_DETAIL
Update Service Request Template	IBU_CF_SR_TEMP_UPDATE_TEMPLATE
Update Service Request View	IBU_CF_SR_VW_UPDATE

Online Help Targets

The following table shows the online help targets for pages in Oracle iSupport. Use the targets in the help pages that you customize for the service request pages that you configure and in other help pages whose text you want to change.

Online Help Targets for Oracle iSupport Pages

Page Description	Target Name for Online Help
Active Conferences	ibuConfSummary
Create Service Request: Select Request Type	IbuSRSelectRequestType
Create Service Request: Identify Problem	IbuSRIdentifyProblem
Create Service Request: Problem Details	IbuSRProblemDetails
Create Service Request: Suggested Solutions	IbuSRSuggestedSolutions
Solution Details	IbuSRSolutionDetail
Create Service Request: Problem Resolved	IbuSRProblemResolved

Page Description	Target Name for Online Help
Create Service Request: Contact Information	IbuSRContactInformation
Create Service Request: Additional Contacts	IbuSRAdditionalContacts
Create Service Request: Review	IbuSRReview
Create Service Request: Confirmation	IbuSRCRConfirmation
Service Request Summary	IbuSRServiceRequestSummary
Service Request Details	IbuSRDetails
Service Request Details: Add Contact	IbuSRDetailsAddContact
Service Request Details: Update Contact	IbuSRDetailsUpdateContact
Close Service Request, Service Request Escalation Request, Reopen Service Request	IbuSRDetailsActions
Service Request View Summary	IbuSRViewSummary
Create Service Request View	IbuSRCreateView
Update Service Request View	IbuSRUpdateView
Search Service Request	IbuSRSearch
Service Request Template Summary	IbuSRTemplateSummary
Create Service Request Template: Select Request Type	IbuSRTempSelectRequestType
Create Service Request Template	IbuSRCreateTemplate
Create Service Request Template: Additional Contacts	IbuSRTempAddContacts
Update Service Request Template	IbuSRUpdateTemplate

Page Description	Target Name for Online Help
Delete/Remove Confirmation. (For now it is used for Service Request Quick Links, Views, and Templates.)	IbuSRRemoveConfirmation
Edit Service Request Quick Links	IbuSRQLEdit
Order Summary	IBUIORD
Order Detail	IBUIORDD
Order Shipments	IBUIORDS
Order Shipments Details	IBUIORDSD
Order Line Details	IBUIORDL
Returns Summary	IBUIRET
Returns Detail	IBUIRETD
Returns Line Details	IBUIRETL
Return Create	IBUIRETC
Return Create Review and Submit	IBUIRETCR
Return Create Confirmation	IBUIRETCC
Technical Library Administration	IBUACAT
Configuring Call Me	IBUACM
Configuring Surveys/Feedback: Create	IBUAFBC
Surveys administration	IBUAFBX
Administering Forums	IBUAFCC
Maintaining Categories	IBUAFCR

Page Description	Target Name for Online Help
Creating Forums	IBUAFFC
Maintaining Forums	IBUAFFNC
Maintaining Messages	IBUAFMM
Using Forum Moderators	IBUAFMOD
Maintaining Users	IBUALLUSER
Enabling Homepage E-Mails	IBUASUB
User group Administration	IBUAUGSP
Searching within Forums	IBUFADSE
Using Forums	IBUFCATV
Posting New Messages to Forums	IBUFMSGP
Viewing Forums	IBUFMSGV
Maintaining the Homepage	IBUHACNT
Changing Mandatory Bin Layout/Display	IBUHALYT
Adding MES Content to Homepage	IBUHAMES
Using the Homepage	IBUHPAGE
Tracking Service Requests on Homepage	IBUHSREDT
Choosing Homepage Content	IBUHUCNT
Changing Homepage Display	IBUHULYT
Viewing Invoices	IBUIINVS
Using Accounts	IBUIORD

Page Description	Target Name for Online Help
Viewing Payments	IBUIPMTS
Technical Library	IBUKTL
Replying to Forum Messages	IBUMSGR
Requesting a Support Call Back	IBUPCMP
Responding to Surveys	IBUPFBGL
Enabling Homepage E-mail Subscriptions	IBUPROFGENERAL
Service Request Templates	IBUTPTMS
Changing Default Customer Account	IBUUMPROFACCOUNT
Adding/Changing Address Information	IBUUMPROFADDR
Viewing Administrators Information	IBUUMPROFADMINV
Adding/Changing Company Information	IBUUMPROFCMPY
Adding/Changing Contact Points (Phone/E-mail/Fax)	IBUUMPROFCTPTV
Setting User Homepage E-mail Subscription	IBUUMPROFGENERAL
Changing/Resetting Password	IBUUMPROFPP
Setting General Preferences	JTFGENPREF
Viewing Contracts	OKCWKTOP
Support Language Administration	IBUALANGMAP
Site Selection Page	IBUSITESELECTION

Java Classes for Seeded Bins

The following table shows the Java classes for seeded Oracle iSupport bins. Use these

class files to create new bins if you remove these bins from the default setup.

Java Classes for Seeded Oracle iSupport Bins

Bin Name	Associated Java Class
Alert	oracle.apps.ibu.homepage.AlertBinRenderer
Solve a Problem	oracle.apps.ibu.homepage.FindSolBinRenderer
Help	oracle.apps.ibu.homepage.HelpBinRenderer
Join Conference	oracle.apps.ibu.homepage.WebConferenceBinRenderer
Language Picker	oracle.apps.ibu.homepage.LanguagePickerRenderer
Login	oracle.apps.ibu.homepage.LoginBinRenderer
MES	oracle.apps.ibu.homepage.MesBinRenderer
Service Request Quick Link	oracle.apps.ibu.homepage.QLServiceRequestBinRenderer
Solution Quick Link	oracle.apps.ibu.homepage.QuickLinkBinRenderer
Quick Navigation	oracle.apps.ibu.homepage.QuickNavBinRenderer
Responsibility Picker	oracle.apps.ibu.homepage.ResponsibilityPickerRenderer
Service Request	oracle.apps.ibu.homepage.ServiceRequestBinRenderer
Technical Library	oracle.apps.ibu.homepage.TechLibBinRenderer

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Custom Look and Feel Configuration

This appendix covers the following topics:

- Overview of Custom Look and Feel Configuration
- Implementation Steps
- Sample Code

Overview of Custom Look and Feel Configuration

This appendix provides the technical design of a sample implementation of an Oracle iSupport custom menu (custom navigation) utilizing the custom navigation framework. Its sole purpose is to demonstrate the custom navigation features in Oracle iSupport. Customers of Oracle iSupport should not adapt any sample source code from this document to production environments without further testing of functionality and performance.

Implementation Steps

This section lists the implementation steps needed to implement the custom menu in Oracle iSupport at a responsibility level and provides the sample source code and the resultant screenshots for this implementation. Oracle assumes that the reader of this document is familiar with the Oracle JTT Framework used by Oracle iSupport and the HTML, JSP, and Java technologies.

The custom navigation framework provides access to all menu objects that are currently available under the Oracle look and feel implementation. The purpose of this framework is to delegate the HTML rendering portion in a page to a customer-defined rendering java class. The menu definition attached to a responsibility continues to be retrieved in the same manner as is currently done.

The custom menu framework gives a developer control of the menu-rendering area on a page by inserting custom HTML and menu-rendering code in the highlighted regions of the page. The support organizations should refer to the JTT custom navigation

developer guide for the details regarding this framework.

The following pictures show the before and after look and feel of a page for which a custom menu renderer is implemented:

The following figure shows a home page before implementation of a custom menu class. The figure descriptions refer to color, which may be available in some media.

The periphery of the page will be changed and appears in yellow as follows:

1. The page title, Oracle iSupport, appears in the upper left of the yellow header region.

2. In the yellow header region, the following links appear horizontally in the upper right corner:

    1. iSupport

    2. Contact Us

    3. Feedback

    4. Profile

    5. Sign Out

    6. Help

3. Immediately below these links, the following tabs appear horizontally:

    1. Home

    2. Account

    3. Support

4. The Quick Find LOV and the Go button appear centered below the darkened tab bar.

5. The narrow left and right yellow borders are blank.

6. In the yellow footer region, the following links appear centered horizontally:

    1. Home

    2. Account

    3. Support

    4. iSupport

5. Contact Us

6. Feedback

7. Profile

8. Sign Out

9. Help

Home Page before Implementation of a Custom Menu Class

The following figure shows the home page after implementation of a custom menu class.

The periphery of the page has changed and appears in yellow as follows:

1. The page title, Vision Enterprises, appears in the upper left of the yellow header region.

2. The tabs are gone from their former location.

3. In the yellow header region about where the tab bar appeared, the following links appear horizontally in a darkened bar in the following order:

1. iSupport

2. Contact Us

3. Feedback

4. Profile

5. Sign Out

6. Help

4. The left and right yellow borders are wider than before and squeeze the central region to make it narrower horizontally. The right border remains blank.

5. The left border is titled iSupport and has the following links arranged vertically:

   1. Name

   2. Account

   3. Support

6. In the yellow footer region, the following links appear horizontally in a darkened bar in the following order:

   1. iSupport

   2. Contact Us

   3. Feedback

   4. Profile

   5. Sign Out

   6. Help

Home Page after Implementation of a Custom Menu Class

Steps Performed

1. Identified all the HTML codes that were required to serve as the page header and page footer in the prototype. In this example, we stripped out HTML codes that were used to render the yellow regions from the source web site. In an actual implementation, the support organization may write this code.

2. Retrieved all style sheet classes for the sample site and saved them in the $OA_HTML directory. Additionally, we overrode some JTT style sheet classes in this custom style sheet for the prototype. For example, we overrode style sheet classes for the following elements in this style sheet:

   • Table background

   • Table cell color

   • Page title (and so on)

3. A support organization must create a new java class to implement the menu feature. For the purpose of this document, a new java class, oracle.apps.ibu.menu.VisionRenderer, was created to implement the JTT CustomRenderer class. The following two methods were used to render the above yellow regions for the prototype:

- public void renderBegin(CustomRenderingContext crc) - Yellow header region

- public void renderEnd(CustomRenderingContext crc) - Yellow footer region

  The HTML codes collected from step 1 were embedded in the following rendering methods for page header and footer. In both these methods, the developer has access to the following menu data, including the menu-highlighting indicator:

- Global icons

- Tab navigation bar

- Second level tab navigation

- Side navigation menu

4. To use this custom menu class, register the following profile option, and set the custom menu class for the Oracle iSupport responsibility used for the prototype:

   JTF_NAV_CUSTOM_RENDERER - oracle.apps.ibu.menu.VisionRenderer

   This profile option should be created under the CRM Foundation, not Oracle iSupport. After it is created, you can set the value of the profile option at the Oracle iSupport responsibility level.

5. After you bounce the middle tier, the new menu renderer will be used when a user logs in using the responsibility for which the custom menu class has been set in the profile option.

Sample Code

The following sample code, VisionRenderer.java, demonstrates the custom menu class. *A support organization should not adapt any sample source codes from this document to production environments without further testing of functionality and performance*.

The custom class for the prototype does not render the following elements that a support organization could add when it defines a custom class:

- Quick Find

- Application switcher

- Bottom menu

- Privacy link

VisionRenderer.java

```
/*======================================================================
====+

|     Copyright (c) 2003 Oracle, Redwood Shores, CA, USA        |

|                        All rights reserved.
|


+======================================================================
===+

|  FILENAME
|

|    VisionRenderer.java
|


|
|

|  DESCRIPTION
|

|    Custom Menu Renderer - Sample
|


|
|

|  NOTES
|


|
|

|  DEPENDENCIES
|


|
|

|  HISTORY
|

|    4/25/2002  ktma  created.
|
```

```
+=======================================================================
===*/

package oracle.apps.ibu.menu;

import java.io.PrintWriter;

import oracle.apps.fnd.common.VersionInfo;

import oracle.apps.jtf.ui.menu.CustomRenderer;

import oracle.apps.jtf.ui.menu.CustomRenderingContext;

import oracle.apps.jtf.ui.menu.MenuItem;

import oracle.apps.jtf.ui.menu.MenuItemList;

import oracle.apps.jtf.ui.menu.QuickSearch;

import oracle.apps.jtf.ui.menu.MenuURI;

import oracle.apps.jtf.ui.menu.blaf.PageNavigation;

/**

* custom renderer for Vision Company

*/

public class VisionRenderer extends CustomRenderer {

/** The version control ID. */

public final static String RCS_ID =

"$Header: $";

public static final boolean RCS_ID_RECORDED =

VersionInfo.recordClassVersion(RCS_ID, "oracle.apps.ibu.menu");

/**

* Constructs a demo custom renderer.

*/
```

```
protected VisionRenderer() {}

/**

* Gets an instance of this custom renderer.

*

* @return an instance of this custom renderer

*/

public static CustomRenderer getInstance() {

// we maintain only one instance in this demo

if (singleInstance == null) singleInstance = new VisionRenderer();

return singleInstance;

}

// if a menu item has a MenuURI object,

// we can add extra parameters to the URI

// some menu item URI cannot be modified,

// getURI() returns null in that case

private static String getURI(MenuItem mi) {

MenuURI muri = mi.getURI();

if (muri != null) {

muri.addParameter("custom", "y");

return muri.getURI();

} else {

return mi.getDestination();

}

}
```

```
/**

* Renders the top part of the navigation.

* In Oracle browser look and feel, this is the part from the top of the

* page to the end of the side navigation.

* The caller of this method

* should ensure that the given rendering context is not null; otherwise

* a <code>NullPointerException</code> may be thrown.

*

* @param crc the rendering context used for rendering

*/

public void renderBegin(CustomRenderingContext crc) {

PrintWriter out = crc.getOutput();

PageNavigation pn = crc.getNavigationData();

StringBuffer sb = new StringBuffer();

// override oracle stylesheet for this custom menu

out.println("<link rel='stylesheet' href='index_files/Vision.css'>");

// get all sub-components

String branding = pn.getBranding();

MenuItemList appSwitcher = pn.getApplicationSwitcher();

// top icons iSupport, Register, logout

MenuItemList globalButtons = pn.getGlobalButtons();

StringBuffer gBhtml = new StringBuffer();

// Home/Forum...

MenuItemList tabBar = pn.getTabBar();
```

```
StringBuffer tBhtml = new StringBuffer();

// Sub tabs under Home/Forum...

MenuItemList hNav = pn.getHorizontalNavigation();

StringBuffer hNhtml = new StringBuffer();

MenuItemList sideNav = pn.getSideNavigation();

StringBuffer sNhtml = new StringBuffer();

QuickSearch qkSearch = pn.getQuickSearch();

StringBuffer sideSub = new StringBuffer();

// render application switcher if there's more than one item

/*

if (appSwitcher != null && appSwitcher.getSize() > 1) {

out.print("<form name=appsw>");

out.print("<select name=appswslct>");

// output an empty option in case nothing is selected

out.print("<option value='#'> </option>");

for (int i = 0; i < appSwitcher.getSize(); i++) {

MenuItem mi = appSwitcher.getMenuItemAt(i);

if (!mi.isVisible()) out.print("<!-- ");

out.print("<option value=\"");

out.print(mi.getDestination());

out.print("\"");

if (i == appSwitcher.getSelectedIndex())

out.print(" selected ");

out.print(" >");
```

```
out.print(mi.getText());

out.print("</option>");

if (!mi.isVisible()) out.print(" -->");

}

out.println("</select>");

out.print("<input type=button value=Switch
onClick=\"document.location");

out.print("=document.appsw.appswslct.options[document.appsw.appswslct.")
;

out.print("selectedIndex].value;\">");

out.print("</form>");

}

*/

// render global buttons only when it's not null or empty

if (globalButtons != null && globalButtons.getSize() > 0) {

MenuItem[] mis = globalButtons.getAllMenuItems();

String gBStyle = new String();

for (int i = 0; i < mis.length; i++) {

// a global button may wish to be hidden

if (mis[i].isVisible()) {

// selected?

if (i == globalButtons.getSelectedIndex())

gBStyle = LEVEL_1S;

else

gBStyle = LEVEL_1;
```

```
// normally global buttons always have text and destination

gBhtml.append("<li><a class=\""+gBStyle+"\" href=\"");

gBhtml.append(getURI(mis[i]));

gBhtml.append("\">");

if (mis[i].getText().equals("iSupport"))

gBhtml.append("Home");

else

gBhtml.append(mis[i].getText());

gBhtml.append("</a>");

} // visible

} // for

} // if

// render tab bar only when it's not null or empty

if (tabBar != null && tabBar.getSize() > 0) {

MenuItem[] mis = tabBar.getAllMenuItems();

String tBStyle = new String();

for (int i = 0; i < mis.length; i++) {

// selected

if (i == tabBar.getSelectedIndex())

tBStyle = LEVEL_2S;

else

tBStyle = LEVEL_2;

// normally tab bar items always have text and destination

tBhtml.append("<li><a class=\""+tBStyle+"\" href=\"");
```

```java
tBhtml.append(getURI(mis[i]));

tBhtml.append("\">");

tBhtml.append(mis[i].getText());

tBhtml.append("</a>");

tBhtml.append(MENU_SPACE);

if (mis[i].getText().equals("Home"))

break;

} // for

} // if

// render horizontal navigation only when it's not null or empty

if (hNav != null && hNav.getSize() > 0) {

MenuItem[] mis = hNav.getAllMenuItems();

String hNStyle = new String();

for (int i = 0; i < mis.length; i++) {

// selected

if (i == hNav.getSelectedIndex())

hNStyle = LEVEL_3S;

else

hNStyle = LEVEL_3;

// normally horizontal navigation items always have

// text and destination

hNhtml.append("<li><a class=\""+hNStyle+"\" href=\"");

hNhtml.append(getURI(mis[i]));

hNhtml.append("\">");
```

```
hNhtml.append(mis[i].getText());

hNhtml.append("</a>");

hNhtml.append(MENU_SPACE);

} // for

} // if

// render side navigation only when it's not null or empty

if (sideNav != null && sideNav.getSize() > 0 && sideNav.isVisible()) {

MenuItem[] mis = sideNav.getAllMenuItems();

String sNStyle = new String();

for (int i = 0; i < mis.length; i++) {

// selected

if (i == sideNav.getSelectedIndex())

sNStyle = LEVEL_3S;

else

sNStyle = LEVEL_3;

// the destination may be null if there are sub menu items

String destination = getURI(mis[i]);

if (destination != null) {

sNhtml.append("<li><a class=\""+sNStyle+"\" href=\"");

sNhtml.append(destination);

sNhtml.append("\">");

sNhtml.append(mis[i].getText());

sNhtml.append("</a>");

} else {
```

```
// you can use the destination of the first sub menu item

// if you want

sNhtml.append("<li><font class=\""+sNStyle+"\">");

sNhtml.append(mis[i].getText());

sNhtml.append("</font>");

}

sNhtml.append(MENU_SPACE);

// get child menu for the selected side nav

MenuItemList submil = mis[i].getSubMenuItems();

// render sub menu items only when they exist

if (submil != null && submil.getSize() > 0) {

sNhtml.append("<br>");

for (int j = 0; j < submil.getSize(); j++) {

MenuItem mii = submil.getMenuItemAt(j);

// selected

if (j == submil.getSelectedIndex())

sNStyle = LEVEL_3S;

else

sNStyle = LEVEL_3;

sNhtml.append("  ");

sNhtml.append("- <a class=\""+sNStyle+"\" href=\"");

sNhtml.append(getURI(mii));

sNhtml.append("\">");

sNhtml.append(mii.getText());
```

```
sNhtml.append("</a><br>");

sNhtml.append(MENU_SPACE); out.println("<!-- "+mii.getText()+" -->");

} // for sub_menu

} // if sub_menu

} // for side nav main

} // if side nave main

// render quick search when it exists

/*

if (qkSearch != null) {

out.println("<br>");

// quick search is selected when search result is being displayed

if (qkSearch.isSelected()) {

out.println("<font color=blue>Quick Search<br></font>");

} else {

out.println("Quick Search<br>");

}

// print out advanced search link if any

if (qkSearch.getAdvancedSearchURI() != null) {

out.print("<sub><a href=\"");

out.print(qkSearch.getAdvancedSearchURI());

out.print("\">");

out.print(qkSearch.getAdvancedSearchPrompt());

out.print("</a></sub>");

}
```

```
out.println(qkSearch.getFormBegin());

out.println("Enter keywords and press a category: ");

out.print("<input type=text name=\"");

out.print(qkSearch.getQueryElementName());

out.print("\"");

if (qkSearch.isSelected()) {

out.print(" value=\"");

out.print(qkSearch.getQueryString());

out.print("\"");

}

out.print(" size=30>");

out.println("<br>");

// getCategoryNames never returns null, but it can be empty

String[] catNames = qkSearch.getCategoryNames();

String[] catValues = qkSearch.getCategoryValues();

for (int i = 0; i < catNames.length; i++) {

// if the category is currently selected

if (qkSearch.getSelectedCategoryValue().equals(catValues[i])) {

out.print("<font color=blue>*</font>");

}

out.print("<a href=\"");

out.print("javascript:document.forms['");

out.print(qkSearch.getFormName());

out.print("'].");
```

```
out.print(qkSearch.getCategoryElementName());

out.print(".value='");

out.print(catValues[i]);

out.print("';");

out.print(qkSearch.getSubmitJavaScript());

out.print("\">");

out.print(catNames[i]);

out.println("</a>");

out.println("   ");

}

out.print("<input type=hidden name=\"");

out.print(qkSearch.getCategoryElementName());

out.println("\">");

out.println(qkSearch.getFormEnd());

}

*/

// Build HTML code here

sb.append("<link rel='stylesheet' href='index_files/Vision.css'>");

sb.append("<SCRIPT language=JavaScript
src=\"index_files/Vision_1.js\"></SCRIPT>");

sb.append("<TABLE cellSpacing=0 cellPadding=0 border=0>");

sb.append("  <TBODY>");

sb.append("  <TR vAlign=top>");

sb.append("    <TD colSpan=3>");
```

```
sb.append("       <TABLE cellSpacing=0 cellPadding=0 border=0
width=\"100%\">");

sb.append("          <TBODY>");

sb.append("           <TR vAlign=top>");

sb.append("             <TD bgColor=#ffffff colSpan=2><A ");

sb.append("              href=\"http://www.Vision.com/e/index.cfm\"><IMG
height=53 alt=Vision ");

sb.append("               src=\"index_files/logo_sub.gif\" width=172
border=0 name=Image9></A></TD>");

sb.append("            <TD align=right bgColor=#ffffff valign=top
class=\"linkSmall\">");

sb.append("<!-- Global icons -->    ");

sb.append("            <img src=\"images/topnav_sep.gif\" border=0
align=middle><A
href=\"http://www.Vision.com/e/resource_center/index.cfm\"
class=\"linkSmall\">Resource Center</A>");

sb.append("            <img src=\"images/topnav_sep.gif\" border=0
align=middle><A href=\"http://www.Vision.com/e/search/index.cfm\"
class=\"linkSmall\">Search</A>");

sb.append("            <img src=\"images/topnav_sep.gif\" border=0
align=middle><A href=\"http://www.Vision.com/e/search/index.cfm\"
class=\"linkSmall\">Site Map</A>");

sb.append("            <img src=\"images/topnav_sep.gif\" border=0
align=middle><A href=\"http://www.Vision.com/e/contactus/index.cfm\"
class=\"linkSmall\">Contact Us</A>");

sb.append("            </TD>            ");

sb.append("          </TR>              ");

sb.append("         <TR vAlign=top bgcolor=\"#003366\">");

sb.append("           <TD colSpan=3 nowrap><A ");

sb.append("
onmouseover=\"MM_swapImage('Image1','','../images/nav_home_hl.gif',1)\"
");

sb.append("             onmouseout=MM_swapImgRestore() ");
```

```
sb.append("                  href=\"http://www.Vision.com/e/index.cfm\"><IMG
height=26 alt=Home ");

sb.append("                 src=\"index_files/nav_home.gif\" width=45
border=0 name=Image1></A><A ");

sb.append("
onmouseover=\"MM_swapImage('ImageSOLUTIONS','','../images/nav_solutions_
hl.gif',1)\" ");

sb.append("                 onmouseout=MM_swapImgRestore() ");

sb.append("
href=\"http://www.Vision.com/e/solutions/index.cfm\"><IMG ");

sb.append("                 alt=solutions
src=\"index_files/nav_solutions.gif\" border=0 ");

sb.append("                 name=ImageSOLUTIONS></A><A ");

sb.append("
onmouseover=\"MM_swapImage('ImagePARTNERS','','../images/nav_partners_hl
.gif',1)\" ");

sb.append("                 onmouseout=MM_swapImgRestore() ");

sb.append("
href=\"http://www.Vision.com/e/partners/index.cfm\"><IMG alt=partners
");

sb.append("                 src=\"index_files/nav_partners.gif\" border=0 ");

sb.append("                 name=ImagePARTNERS></A><A ");

sb.append("
onmouseover=\"MM_swapImage('ImageINDUSTRIES','','../images/nav_industrie
s_hl.gif',1)\" ");

sb.append("                 onmouseout=MM_swapImgRestore() ");

sb.append("
href=\"http://www.Vision.com/e/industries/index.cfm\"><IMG ");

sb.append("                 alt=industries
src=\"index_files/nav_industries.gif\" border=0 ");

sb.append("                 name=ImageINDUSTRIES></A><A ");
```

```
sb.append("
onmouseover=\"MM_swapImage('ImageCUSTOMERS','','../images/nav_customers_
hl.gif',1)\" ");


sb.append("                onmouseout=MM_swapImgRestore() ");


sb.append("
href=\"http://www.Vision.com/e/customers/index.cfm\"><IMG ");


sb.append("                alt=customers
src=\"index_files/nav_customers.gif\" border=0 ");


sb.append("                name=ImageCUSTOMERS></A><A ");


sb.append("                href=\"ibuhpage.jsp\"><IMG ");


sb.append("                alt=servicessupport
src=\"index_files/nav_servicessupport_on.gif\" ");


sb.append("                border=0 name=ImageSERVICESSUPPORT></A><A ");


sb.append("
onmouseover=\"MM_swapImage('ImageCOMPANY','','../images/nav_company_hl.g
if',1)\" ");


sb.append("                onmouseout=MM_swapImgRestore() ");


sb.append("
href=\"http://www.Vision.com/e/company/index.cfm\"><IMG alt=company ");


sb.append("                src=\"index_files/nav_company.gif\" border=0
name=ImageCOMPANY></A><A ");


sb.append("
onmouseover=\"MM_swapImage('ImageNEWS','','../images/nav_news_hl.gif',1)
\" ");


sb.append("                onmouseout=MM_swapImgRestore() ");


sb.append("
href=\"http://www.Vision.com/e/news/index.cfm\"><IMG alt=news ");


sb.append("                src=\"index_files/nav_news.gif\" border=0
name=ImageNEWS></A></TD></TR>");


sb.append("        <TR vAlign=top>");


sb.append("          <TD><IMG height=10 src=\"index_files/space.gif\"
width=190></TD>");
```

```
sb.append("          <TD><IMG height=10 src=\"index_files/space.gif\"
width=10></TD>");

sb.append("          <TD><IMG height=10 src=\"index_files/space.gif\"
");

sb.append("        width=580></TD></TR></TBODY></TABLE></TD></TR>");

sb.append("  <TR vAlign=top>");

sb.append("    <TD                   ");

sb.append("      <TABLE cellSpacing=0 cellPadding=0 width=190
border=0>");

sb.append("        <TBODY             ");

sb.append("         <TR              ");

sb.append("          <TD> </TD>");

sb.append("          <TD vAlign=top><SPAN
class=subNavHeader><BR>Services &amp; Support</SPAN><BR><BR>");

sb.append("<!-- side nav begin -->  ");

sb.append("<!-- Global icons -->");

sb.append(gBhtml.toString()); // top navigation --- global button

sb.append("<Br>");

if (!hNhtml.toString().equals("")) {

sb.append(hNhtml.toString());

}

sb.append("<Br>");

if (!sNhtml.toString().equals("")) {

sb.append(sNhtml.toString());

}

sb.append("<Br>");
```

```
if (!sideSub.toString().equals("")) {

sb.append(sideSub.toString());

}

sb.append("<!-- side nav end -->");

sb.append("          </TD>");

sb.append("        </TR>");

sb.append("        <TR>");

sb.append("          <TD><IMG height=5 src=\"index_files/space.gif\"
width=10></TD>");

sb.append("          <TD><IMG height=5 src=\"index_files/space.gif\" ");

sb.append("        width=180></TD></TR></TBODY></TABLE>");

sb.append("       <P class=paragraphPad> </P></TD>");

sb.append("    <TD>  </TD>");

sb.append("    <TD>");

sb.append("<!-- Content begin -->");

out.println(sb.toString());

} // renderBegin

/**

* Renders the bottom part of the navigation.

* In Oracle browser look and feel, this is the part that contains

* a footer, copyright text and privacy statement link.

* The caller of this

* method should ensure that the given rendering context is not null;
otherwise

* a <code>NullPointerException</code> may be thrown.
```

```
 *

 * @param crc the rendering context used for rendering

 */

public void renderEnd(CustomRenderingContext crc) {

PrintWriter out = crc.getOutput();

PageNavigation pn = crc.getNavigationData();

// override stylesheet...

out.println("<link rel='stylesheet' href='index_files/Vision.css'>");

// get copyright and privacy information

//String copyrightText = pn.getCopyrightText();

//String privacyText = pn.getPrivacyText();

//String privacyURI = pn.getPrivacyURI();

// footer HTML from Vision.com

out.print("<!-- Content End -->
");

out.print("    </TD>
");

out.print("  </TR>
");

out.print("  <TR vAlign=top>
");

out.print("    <TD> </TD>
");

out.print("    <TD> </TD>
");

out.print("    <TD> </TD></TR>
");

out.print("  <TR vAlign=top>
");
```

```
out.print("      <TD colSpan=3>
");

out.print("        <TABLE cellSpacing=0 cellPadding=0 width=100% border=0>
");

out.print("          <TBODY>
");

out.print("          <TR>
");

out.print("            <TD vAlign=top align=right bgcolor=\"#003366\"><IMG
height=23                                    ");

out.print("              alt=\"Unlocking the Motion of Industry\"
src=\"index_files/footer.gif\"          ");

out.print("              width=780><BR><SPAN
class=linkCopyright></td</tr>");

out.print("            <tr><TD vAlign=top align=right><A
");

out.print("
href=\"http://www.Vision.com/e/company/privacy.cfm\"><SPAN
");

out.print("              class=linkCopyright>Privacy Policy</SPAN></A> |
<A                              ");

out.print("
href=\"http://www.Vision.com/e/resource_center/index.cfm\"><SPAN
");

out.print("              class=linkCopyright>Resource Center</SPAN></A> |
<A                              ");

out.print("
href=\"http://www.Vision.com/e/search/index.cfm\"><SPAN
");

out.print("              class=linkCopyright>Search</SPAN></A> | <A
");

out.print("
href=\"http://www.Vision.com/e/search/index.cfm\"><SPAN
");

out.print("              class=linkCopyright>Site Map</SPAN></A> | <A
");
```

```
out.print("
href=\"http://www.Vision.com/e/contactus/index.cfm\"><SPAN
");

out.print("               class=linkCopyright>Contact Us</SPAN></A><BR><A
");

out.print("               href=\"http://www.Vision.com/e/index.cfm\"><SPAN
");

out.print("               class=linkCopyright>Home</SPAN></A> | <A
");

out.print("
href=\"http://www.Vision.com/e/solutions/index.cfm\"><SPAN
");

out.print("               class=linkCopyright>Solutions</SPAN></A> | <A
");

out.print("
href=\"http://www.Vision.com/e/partners/index.cfm\"><SPAN
");

out.print("               class=linkCopyright>Partners</SPAN></A> | <A
");

out.print("
href=\"http://www.Vision.com/e/industries/index.cfm\"><SPAN
");

out.print("               class=linkCopyright>Industries</SPAN></A> | <A
");

out.print("
href=\"http://www.Vision.com/e/customers/index.cfm\"><SPAN
");

out.print("               class=linkCopyright>Customers</SPAN></A> | <A
");

out.print("               href=\"ibuhpage.jsp\"><SPAN
");

out.print("               class=linkCopyright>Services &amp;
Support</SPAN></A> | <A                          ");

out.print("
href=\"http://www.Vision.com/e/company/index.cfm\"><SPAN
");
```

```java
out.print("                class=linkCopyright>Company</SPAN></A> | <A
");

out.print("
href=\"http://www.Vision.com/e/news/index.cfm\"><SPAN
");

out.print("                class=linkCopyright>News &amp;
Events</SPAN></A><BR><BR>Vision,                 ");

out.print("             Inc.<BR>Copyright 2003, All Rights
Reserved.</SPAN>                             ");

out.print("      </TD></TR></TBODY></TABLE></TD></TR>
");

out.print(" <TR vAlign=top>
");

out.print("    <TD><IMG height=5 src=\"index_files/space.gif\"
width=190></TD>                      ");

out.print("    <TD><IMG height=5 src=\"index_files/space.gif\"
width=10></TD>                      ");

out.print("    <TD><IMG height=5 src=\"index_files/space.gif\"
width=580></TD></TR></TBODY></TABLE>     ");

// footer HTML from Vision.com

}

private static VisionRenderer singleInstance;

/**

* Stylesheet constant for menu highlight

*/

private static final String LEVEL_1 = "linkBold";

private static final String LEVEL_1S = "linkBold";

private static final String LEVEL_2 = "linkBold";

private static final String LEVEL_2S = "linkBold";

private static final String LEVEL_3 = "linkBold";
```

```
private static final String LEVEL_3S = "linkBold";

private static final String LEVEL_3A = "linkBold";

private static final String LEVEL_3AS = "linkBold";

private static final String MENU_SPACE = "";

private static final String TOP_NAV_SPACE = "<img
src=\"images/topnav_sep.gif\" border=0 align=middle>";

}
```

E

Configuration of AK Regions

This appendix covers the following topics:

- Configuring Oracle iSupport Service Request Pages
- Example 1: Customizing a Top-Level Attribute
- Example 2: Customizing a Nested Region Attribute

Configuring Oracle iSupport Service Request Pages

The following examples show how to customize and configure Oracle iSupport Service Request pages.

> **Note:** Oracle recommends that you do not customize regions that are provided out-of-the-box. Changes made to these regions can be overwritten by subsequent applications of patches. Make all customizations to regions that are cloned and created specifically to avoid loss or change of data. Additionally, always copy the regions that have been seeded out of the box rather than one of the regions you have created, even though they were copied from the seeded ones.

Example 1: Customizing a Top-Level Attribute

Consider, for example, that you want to customize the Create Service Request: Identify Problem page to display the field for Project Number (which, by default, is hidden) under the Problem Summary section for users of responsibility iSupport Business User.

Steps

Part 1: Customizing the Region

1. Determine the top level region that is associated with this page.

To determine what top region is associated with a page that you are viewing, view the source of the page through your browser and search for Top Region Code. This code is the topmost AK region used to render the page. All the relevant UI attributes on that page are either under that region or in the nested region that it includes. In this case, the top level region is IBU_CF_SR_CR_IDENTIFY_PROBLEM.

2. Log into the AK application through Oracle Forms and bring up the Define Regions window.

3. Query up the region IBU_CF_SR_CR_IDENTIFY_PROBLEM and click the Copy... button.

4. Enter the Application Name Oracle iSupport and an identifier for the new region, not exceeding 30 characters, say cUST_SR_CR_IDENT_PROBLEM, and click OK.

   All seeded regions begin with the prefix IBU_CF, and it is recommended that customized regions not use the same prefix.

5. Requery up the newly cloned region and overwrite the existing region name with a new identifier.

6. Click the Region Items button to bring up the attributes for this region.

7. Look for the attribute name IBU_CF_SR_PROJECT_NUMBER.

   Note that the Node Display column for this attribute is cleared to indicate that this field is not currently displayed.

8. Select the check box under Node Display to display this column.

9. Save the change.

   > **Note:** To make a field mandatory, select the Required field for the corresponding attribute. To move the order of the fields within the region, modify the Sequence field for the attribute. To change the label for the attribute, modify the Long Label field for the attribute.

Part 2: Customizing the Page

1. Bring up the iSupport administration page Page Region Mapping.

2. Enter the page and context level for which you want the region to be customized, and click Go.

   For example, the page name can be Create Service Request: Identify Problem, and the context level can be Responsibility. You can also choose All for context to display all the different context levels that are currently configured for this page.

3. In the results table, if an entry exists for the context of Responsibility, then click the corresponding Edit icon. If the entry does not exists, then click Create Mapping.

4. If you are creating a new mapping, then choose and enter the appropriate values for the fields, mapping the newly cloned region to the proper page and context level, and click Create. If you are editing an existing mapping, then simply choose the newly cloned region and click Update.

Part 3: Setting the Profile

1. Set the profile option iSupport: Region/Field Level Configuration Option to Custom.

   Customizations do not take effect unless this profile value is set appropriately.

2. Clear the mid-tier cache so that the system picks up the new configuration.

Example 2: Customizing a Nested Region Attribute

The steps for customizing a nested region attribute are very similar to the steps in Example 1. Parts 2 and 3 are identical. Therefore, this example shows only the steps required for Part 1.

Consider, for example, that a customer wants to display the Preferred Language field in the Primary Region region in the Create Service Request: Identify Problem page for Oracle iSupport users with responsibility iSupport Business User.

The following are the steps required to make this change:

Steps

Part 1: Customizing the Region

1. Determine the top-level region that is associated with this page. In this case, the top level region is IBU_CF_SR_CR_IDENTIFY_PROBLEM.

2. Log into the AK application through Forms and bring up the Define Regions window.

3. Query up the region IBU_CF_SR_CR_IDENTIFY_PROBLEM and click the Region Items button.

4. Identify the nested region name for the Primary Contact region identified by the attribute code IBU_CF_SR_PRIMARY_CONTACT_RG. In this case, it is IBU_CF_SR_CR_PRIMARY_CONTACT.

5. Query up this region in the Define Regions window, and click the Copy... button.

6. Enter the Application Name Oracle iSupport and an identifier for the new region, not exceeding 30 characters, say CUST_SR_CR_PRIM_CONTACT, and click OK.

7. Requery up the newly cloned region and overwrite the existing region name with a new identifier.

8. Click the Region Items button to bring up the attributes for this region.

9. Look for the attribute name IBU_CF_SR_PREFERRED_LANG. Note that the Node Display column for this attribute is unselected to indicate that this field is not currently displayed.

10. Select the check box under Node Display to display this column.

11. Save the change.

12. Requery up the region IBU_CF_SR_CR_IDENTIFY_PROBLEM, and clone this region following the steps to clone a region.

13. Bring up the region items for this region.

14. Find the attribute IBU_CF_SR_PRIMARY_CONTACT_RG for this region and modify the Nested Region Name field to the newly cloned region for the Primary Contact (that is, CUST_SR_CR_PRIM_CONTACT).

15. Save the changes.

Note the major difference between this example and Example 1 is that this one requires the cloning of two regions instead of one because the attribute that needs to be customized is in a nested region within the page. All other steps remain the same.

Glossary

account

Account refers to the details or attributes of a deploying company's selling relationship with a party. A selling relationship can include orders or negotiated prices. Account attributes do not describe a party; they only exist when a selling relationship is present between the deploying company and the party.

account number

Number designated in the Trading Community Architecture (TCA) or Accounts Receivable (AR) and used to group account information about a party.

account site

A party site that is used within the context of an account, e.g., for shipping or billing purposes.

business entity

A branch, subsidiary, division, etc. of a company.

company

The entire business, including all business entities in the organizational structure.

contact point

A means of contacting a party other than sending physical mail, e.g., a phone number, e-mail address, telex number, fax number, etc.

customer

A person or organization with whom the deploying company has a selling relationship, regardless of whether anything has actually been purchased or serviced. A selling relationship may be established by actually selling products, or it may be established by simply negotiating terms that will be used if you later sell products. In both scenarios, a *selling relationship* exists.

deploying company

The Oracle customer that has, or will, install, implement, and run all or part of the Oracle E-Business suite.

DUNS Number

A unique identifier used by Dun & Bradstreet, a major business data content provider. The DUNS number is an attribute in the TCA.

GUI

An acronym for Graphical User Interface.

instance, item instance

In Oracle Install Base, an instance is an occurrence of an item entity. For example, a manufacturer has a part number for a television he makes; each time he sells one television, an occurrence of this part number is recorded in Install Base

location

A point in geographical space described by a street address.

merchant

An Oracle E-business suite customers. Used to alleviate confusion with the term *customers*, which refers to customers of a business using Oracle products.

multiple organizations (multi org)

The ability to define multiple organizations and the relationships among them within a single installation of Oracle Applications. These organizations can be sets of books, business groups, legal entities, operating units, or inventory organizations.

party

An entity in the TCA that can enter into business relationships. A party is a real person, an organization, a branch, a subsidiary, a legal entity, a holding company, etc. In TCA, the attributes of a party are considered universal, i.e., they are independent of your selling or buying relationship with the party.

party access list

A list of parties, which a user can access.

party relationship

In TCA, a binary relationship between two parties, such as a partnership. A party relationship can be a party itself, meaning certain party relationships can enter into relationship themselves.

party site

In TCA, the link between a party and a location that indicates the location is valid for that party. A party site is not intended to represent a distinct business entity with which you can do business.

registration

Refers to the process by which any user would gain access to application functionality.

Registration Admin UI

User Interface (UI) used by merchant administrator or any person granted privileges to maintain users and accounts.

Registration Self-Service User UI

User Interface (UI) that is used by individual users or business users to register themselves.

registration template

Part of the Oracle CRM JTF User Management Framework (JUMF), registration templates are JSP pages set up by the application administrator to capture accommodate user information-gathering requirements.

responsibilities

A grouping of application menus that determine the user interface accessible to a particular user.

roles

Groupings of permissions which are page- and function-level, granular privileges used to maintain application security.

self-service registration

Refers to the process of user self-registration through a self-service UI, as opposed to being registered by an administrator. Self-service registration includes the UI and background processes used to complete the registration processes (including assigning users the appropriate data access and UI access privileges).

service request view

A saved query of service requests.

system administrator

Also called sysadmin, the system administrator is a user who performs the highest-level administrator tasks in Oracle applications.

TCA

An acronym for Trading Community Architecture, sometimes used interchangeably with the Oracle Trading Community Model.

Trading Community Model

The Oracle Trading Community Model, also known as Trading Community Architecture (TCA).

UI

An acronym for User Interface.

user

Refers to any person who needs access to any application. This includes various types of customers, partners, suppliers, and employees.

user types

Users are categorized into types based on their registration requirements and access privileges. User types can be associated with default roles, responsibilities, accounts, registration templates, and approval requirements.

user type, business

A user with a selling relationship to the deploying company.

user type, employee

A user who is an employee of the deploying company.

user type, individual

A user with no selling relationship to the deploying company.

user type, primary

A designated person of a party, business entity, or internal group (for example, sales department) who is responsible for approving other users and resetting passwords.

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