Oracle Fusion Service

Case Management: Questions and Answers

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1 Questions and Answers

What are the lookup types for Case Management and how do I change them?

Lookup types provide the lists of values in application fields that are drop-down lists. Lookup types for Case Management can be changed during or after your implementation.

For example, while creating a case, personnel can select the priority of the case from the Priority drop-down list. The values in that list are derived from the lookup type, ORA_SVC_SR_PRIORITY_CD. This lookup type has several potential values known as lookups, each with their own unique lookup code and meaning that displays in the UI.

> **Note:** You can't create a new lookup with the name starting with ORA, to avoid any conflict with the lookups predefined in the application.

How You Modify Lookup Types

You can change many lookup types during or after implementation.

The configuration level of a lookup type determines whether the lookups in that lookup type can be edited. The lookup configuration levels are: User, Extensible, and System.

Here's a table that shows which lookup management tasks are allowed at each modification level.

Allowed Task	User	Extensible	System
Deleting a lookup type	Yes	No	No
Inserting new codes	Yes	Yes	No
Changing the wording that displays on the page (Meaning field)	Yes	Yes	Yes
Updating start date, end date, and enabled fields	Yes	Yes, only if the code isn't predefined data	No
Deleting codes	Yes	Yes, only if the code isn't predefined data	No
Updating tags	Yes	No	No
Updating module	Yes	No	No

If a product depends on a lookup type, the configuration level must be set to system or extensible to prevent deletion. Once the configuration level is set for a lookup type, it can't be changed. The configuration level for lookup types created using the Define Lookups page is by default set at the User level.

Case Management Lookup Types

You can find lookup types by searching for an associated setup task in the Setup and Maintenance work area. Lookup types that are commonly edited are presented within the Case Management offering as one of the setup tasks or task lists. Other lookup types that are less frequently changed, might not be shown in the offering, but can still be accessed through the Manage Common Lookups task. Here are some common help desk lookup tasks or task lists:

Case Lookup Types and Descriptions

Lookup Type Code	Description
ORA_SVC_CASE_CONTACT_REL_CO	Case Contact Relationship Code
ORA_SVC_CASE_MSG_STATUS_CD	Status of message.
ORA_SVC_CASE_MSG_TYPE_CD	Type of message associated with a case.
ORA_SVC_CASE_MSG_VISIBILITY_CD	Can be used to decide if message should be visible to internal or external users.
ORA_SVC_CASE_PRIORITY_CD	Priority of the case.
ORA_SVC_CASE_SENSITIVITY_CD	Sensitivity of the case.
ORA_SVC_CASE_SOURCE_CD	Sources of origin for case.
ORA_SVC_CASE_STATUS_CD	Status of a case
ORA_SVC_CASE_STATUS_TYPE_CD	Status type such as Active or Closed.
ORA_SVC_CASE_TYPE_CD	Type of the Case.
ORA_SVC_CASE_SEARCH_REC_SET_CD	Case search record set type.

How do I set up inbound and outbound email?

You can configure email to use a single email channel to handle both inbound and outbound email messages. Inbound messages are the messages that you receive from your customers. Outbound messages are the messages that you send to your customers.

> **Note:** When your customers receive an email from your company, they can reply directly to the email. They don't have to change the **To** address in the reply. The To address already displays the account name field of the channel that the agent uses in the outbound message.

Use the following tasks in Setup and Maintenance to set up inbound and outbound email.

No.	Task	Describes how to
1.	Enable Configuration of Email Communications	Enable the tasks required to configure inbound and outbound email communications for service requests.
2.	Configure an Email Channel	Configure an email channel for your organization.
3.	(Optional) Create and Update Inbound Message Filters	Set up email filters. Filters enable you to set one or more criteria based on which an incoming message from a customer or a partner can be accepted or rejected.
4.	Configure Profile Options for Inbound and Outbound Email	Configure inbound and outbound email profile options.
5.	(Optional) Define Email Templates	Define email templates.
6.	(Optional) Modify Acknowledgment Messages for Inbound Email	Modify the predefined acknowledgment messages provided by the application according to your company's requirement.
7.	Access Point Setup for Inbound Emails: This section consists of multiple topics.	The procedures in this section describe how to verify your email channel configurations and how to register the correct access points with the UMS.
8.	Configure a Job to Process Inbound Emails	Configure a job to process inbound emails to retrieve emails from the customer at regular intervals.

How do I configure an email channel?

To send emails to your customers and to receive emails from them, you must first set up an email channel.

You can create separate email channels for different application stripe codes. For example, one for CRM and one for HCM. However, you can use the same email channel for both inbound and outbound emails:

> **Note:** You can add attachments totaling 10MB to an email.

- **Inbound email**: Indicates the service emails received from your customers. As part of your implementation, you must set up a forwarding rule on your company email server to redirect these emails to Oracle's inbound email ID. This is the same email account that Oracle provided at the time of provisioning. For example, all the support emails that are sent to `TechSupport@mycompanydomain.com` are forwarded to `pod_name.fa.extservice.incoming@pod_name-opcwf.mail.dcsn.oraclecloud.com` for processing. The

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SVC_INBOUND_EMAIL_ADDRESSES profile option indicates the Oracle email ID to which the support mails must be forwarded.

If it's required for your company, you can also create different support email channels for different business units or divisions. For example, `TechSupportDiv1@mycompanydomain.com, TechSupportDiv2@mycompanydomain.com,` and so on. All the support emails sent to these different support email channels are forwarded to `pod_name.fa.extservice.incoming@pod_name-opcwf.mail.dcsn.oraclecloud.com` for processing.

> **Note:** If you're implementing HR Help Desk or Internal Help Desk, then you must define a channel with the appropriate application stripe. The account name of the channel must match the email address of your mailbox from which you're redirecting or forwarding emails to the Oracle mailbox mentioned above. If you don't define the appropriate channel, the requests created for the emails are set with the CRM application stripe. In such cases, you must run an ODI import process to update the application stripes of the SRs.

The SVC_INBOUND_EMAIL_ADDRESSES profile option contains two email IDs:

- For CRM, use the email ID that contains the text 'extservice' as a part of the ID, as the forwarding email ID.

> **Note:** You must avoid updating these inbound email addresses. If you need to update these inbound email addresses for some reason, you must complete the following steps:
> - Update the corresponding forwarding rule.
> - Ensure that you register the updated inbound email addresses as access points for inbound email. See *How do I register or unregister access points for inbound email?*

- **Outbound email**: Indicates the emails that are sent by the Service application from the request. For example, when an agent responds to the primary customer contact.

  To ensure that your outbound email is delivered successfully to your external recipients, you must set up a Sender Policy Framework (SPF) policy on your domain.

  To enable Oracle to send out an email on your behalf, you must do the following:

  - Set up an SPF policy on your domain as an authentication mechanism. The exact method of setting up an SPF policy varies from one domain provider to another. For example, `v=spf1 include:spf_c.oraclecloud.com ~all.`
  - To set the support agent's name as the **From Name** in outbound emails, set the value for the SVC_USE_RESOURCE_NAME_IN_OUTBOUND profile option to **Yes**. For more information, see *How do I set the From Name in outbound emails?*

To configure an email channel for the customer:

1. In the Setup and Maintenance work area, go to the following:

   - Offering: Service
   - Functional Area: Communication Channels
   - Task: Manage Communication Channels

2. In the **Service Channels** page, click **Create Channel**.

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3. In the **Create Channel** window:

    a. Select a **Stripe Code**.

      Select **CRM** to process emails from and to external customers. Select **HCM** to process emails from and to internal employees, through the HCM Help desk support.

    b. The **Purpose** field is set to **Support** by default.

    c. Select the **Channel Type** as **Email**.

    d. Specify the support email ID of your company as the **Account Name**. For example:

      `support@mycompanydomain.com`

      If a forwarding rule is configured, all the mails that are sent to the specified support email ID are forwarded to Oracle's inbound email ID. If an outbound email is configured, Oracle can send mails to the customer as the specified support email ID, on your behalf.

    e. Verify whether the generated **Channel Code** is unique.

      The channel code is autogenerated and it uniquely identifies a communication channel when exporting or importing channels from one environment to another.

      - If the auto-generated channel code is unique, you can leave it unchanged.
      - If the auto-generated channel code isn't unique, add a set of characters to the code to make it unique.

    f. (Optional) Specify a **Display Name** to indicate any information about the channel, such as the name of the deploying company for which the channel is being configured.

    g. When a new channel is being created, it's active by default. To deactivate it, clear the **Active** option.

    h. (Optional) From the **Business Unit** drop-down list, select a Business Unit (BU).

      The BU set in the scope is selected by default, but you can select a different BU. This column appears only if the multiple business units feature is turned on.

    i. Click **Save**.

How do I set queue assignment rules?

You can create assignment rules by using rule sets, rules, conditions, and actions.

The assignment engine uses your rules to evaluate and recommend candidate assignments for specified work objects.For example, you can assign all Cases with a certain case type to one queue, or you can assign a Case to a critical queue if the priority of the Case is high.

> **Note:** A particular work item can be assigned only to a single queue. So it's good to be careful while defining rules. You can't define different rules that assign the same work item to different queues.

To create a service assignment rule:

1. In the Setup and Maintenance work area, go to the following:

    ○ Offering: Service

    ○ Functional Area: Communication Channels

    ○ Task: Manage Service Assignment Rules

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2. On the Manage Service Assignment Rules page, select from the **Category** drop-down list:
   - **Case Queueing Rules**
3. Do one of the following:
   - Create a rule set by clicking the **Plus** icon and specifying the required values.
   - Select an existing rule set.
4. Create a rule within the rule set by completing the following steps:
   a. Click the **Plus** icon in the **Rule set: Rules** region.
   b. On the Create Rule page, specify a rule name.
   c. (Optional) Specify a description, an effective start date, and an end date for the rule.
      If you don't select an effective start date and end date, the rule comes into immediate effect and lasts indefinitely.
   d. (Optional) Select the Inactive option if you want to enable the rule at a later date.

   Note: You can create multiple rules within a rule set.

5. Specify an assignment condition as described later in this topic, in the "Specify a Condition and an Action" section.
   This assignment condition is evaluated before a rule-based assignment is made.
6. Select a queue to which a case is assigned if the condition is met.

Specify a Condition and an Action

After specifying the rule details, specify one or more conditions and select a queue to which the Case is assigned, if the condition is satisfied. When the specified condition is satisfied, the Case is assigned to a queue. For example: If the priority of the Case is equal to High, assign the Case to the Critical_Queue.

To specify a condition and an action:

1. Select an option from the **Rule Applies If** drop-down list.
   You can choose to perform the action if all of the conditions are met or if one of the conditions is met.
2. Click the **Plus** icon to add a condition.

   Note: If you don't add a condition, all your work items are assigned to the queue that you add in step 4.

3. Select the object, an attribute, an operator for the condition, and a value.
   For example, **Case** is the object, **Priority** is the attribute of the object, **Equals** is the condition, and **High** is the value. Hence, the condition is **If Case Priority is equal to High**.
4. Add an action to be performed when the condition is satisfied. Click the **Plus** icon to select and add a queue.

   CAUTION: Oracle recommends that you always add an action. If you don't add an action, the assignment engine acts unpredictably and you may face issues in the assignment of work items to queues.

5. Search for a queue, select the required queue from the list, and click **Done** to add the queue to the action.
6. Click **Save and Close**.

Related Topics
- How do I update existing setup data?

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How do I manage action plan actions?

Use the Manage Action Plan Actions task to create and edit actions for action templates or individual actions used in cases. In this task, you specify the category, type, duration, visibility, and attribute mappings for each action.

To manage action plan actions, in the Setup and Maintenance work area go to the following:

- Offering: Service

- Functional Area: Action Plan

- Task: Manage Action Plan Actions

Create a New Action

Here's how to create a new action:

1. Click **Create Action**.
2. Enter the action name.
3. If you enabled business units for service requests for help desk requests or stripe codes, use the drop-down lists to select the stripe code and BU.
4. Select **Category**.

   Select **Class**.
5. Select the **Action Type**.

   Depending on the Fusion Service features you're using, Action types can include:

   - Appointment
   - Article

     > **Note:** You can create an Action of type Article. You must select Stripe Code of the action and then select Sub Type of the action. The Attribute Mapping section must be populated as it's required for any other type of actions.

   - Case
   - Dynamic Process
   - HR Help Desk Request (If you're using the Help Desk Offering)
   - Internal Service Request (If you're using the Help Desk Offering)
   - Opportunity (If you're using the Sales offering)
   - Service Request
   - Task

   Follow the next four steps if you're creating a Dynamic Process Action (with the Run Processes Through Action Plans feature). If you aren't using this feature, you can skip the next four steps.
6. Click the **Edit** icon in the **Process Name** field.

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7. Search for and select the process you want to add to the action.

   Processes must already be created in Oracle Process Cloud and your connections to Oracle Process Cloud must be working.

   Also, the administrator must be added to the Process Application Administrator role in the process workspace UI so they can see all processes.

   > **Note:** When you create processes, you must define the following case-sensitive input parameters - objectNumber, objectType, actionPlanId, actionPlanActionId, and processParentObjectType when configuring dynamic processes. For Solo Actions, input parameter `processParentObjectType` will have value `'ActionPlan'` while for Plan based actions it will have `'ActionPlanAction'`.

8. Click **OK**.
9. Select to use the default version of the process, if you want to use the default process version instead of the version-specific process.

   > **CAUTION:** After a process is deployed, overriding it will remove all running instances. Oracle recommends that you create a new version for more changes and mark it as default, if it's required. An action which has **Use default version** selected will ensure that only the default version in Oracle Process Automation is used to create process instances. For processes whose inputs are form based, make sure the interface argument is the same.

10. Select the **Action Visibility**.

    Visibility options include:

    - Not Published - Only visible to the administrator. The action isn't available to add to a template and can't be added by an agent as an another action.
    - Customer Visible - Optional. Used only for user interface configurations to display or hide Actions.
    - Internal Only - Visible internally only.

11. Enter a context for the action.

    Context options include:

    - Opportunity
    - Service Request
    - Internal Help Desk Request
    - HR Help Desk Request
    - Case

12. Enter a numeric value for the **Duration** of how long the task should take. Select a unit of measure for the numeric value (days, hours, or minutes).

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13. Select a **Stripe Code** (CRM, HCM, ISR, or HRSR) from the drop-down list.

> **Note:** If you select the type as SR, you shouldn't select stripe as ISR/HRHD. This leads to ambiguity whether the underlying object created should be CRM SR or ISR/HRHD.
>   ○ If the agent wants the associated object to be CRM SR, select the following:
>
>   - Type: SR
>   - Stripe: ORA_SVC_CRM
>   ○ If the agent wants the associated object to be ISR, select the following:
>   - Type: ISR
>   - Stripe: ORA_SVC_ISR
>   ○ If the agent wants the associated object to be HRHD, select the following:
>   - Type: HRHD
>   - Stripe: ORA_SVC_HRHD

14. Select a **Category** from the drop-down list.
15. You can define a specific relationship to be created for the action by selecting an **Object Link Type** from the drop-down list. If you don't select a specific object link type, the global setting is used.
16. Check the Copy Attachments check box if you want all attachments to be copied from the context object to the target object. You can select to copy all attachments for the following object types:
    ○ Cases

    ○ Service Requests

    ○ Help Desk Requests

    ○ Internal Service Requests

17. Enter a description of the action and any pertinent details.
18. If necessary, make edits on the **Attribute Mapping** or **Status Mapping** tabs. These are explained next.
19. Click **Save and Close**.

Attribute Mapping Tab

Every action in an action plan has a related object (as in a task, appointment, opportunity, case, or service request) that's automatically created when the action starts.

The attribute mapping tab is where you set up the mapping of information from the action, parent case, and user-defined values into the related object when it's created.

> **Note:** There are no attributes to map for Dynamic Processes. If you're creating a Dynamic Process Action, there isn't anything to do on this tab.

Mapped attributes come from the fields in the related object. Required attributes are automatically listed, and you can add optional attributes. The **Mapped To** column shows where the information comes from that populates the field on the related object.

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> **CAUTION:** If you map attributes incorrectly, the creation of the business objects during orchestration in Action Plans will fail.

Required fields are shown in the **Required** column. Additional fields might also be listed that can't be changed. For example, Activity Type displays Task if that action type is Task or defaults to Appointment if the action type is Appointment.

Here's how you add an attribute mapping:

1. Click the **Add** icon.
2. Select the field to be populated from the **Attribute** choice list.
3. In the **Mapped To** column, select from where the fields must be populated. Choices are: service request, action, or a user-defined value.
4. Depending on the attribute you selected in the previous step, enter free-form text to the box for free-form values. For service request or action, select the field from the choice list in the last column.

For more information about mappings for an article, see the topic Attribute Mappings for Knowledge Articles in this chapter.

Status Mapping Tab

The related business objects created for actions can have different user-defined status values. However, they must be mapped into a new set of status codes for an action in an action plan. You can do this at a global level for all actions, or individually for one action if it has unique attributes. When a user updates an object, the status mapping rules decide how the status of an action updates on an action plan. For example, when a task is set to closed or completed, then the action status is completed.

> **Note:** If you don't define the status mapping at the action level, then the default is the global status mapping. Also, there are no statuses to map for Dynamic Processes. If you're creating a Dynamic Process Action, there isn't anything to do on this tab. There are however, predefined status value mappings that can't be changed.

For more information about the global action status configuration, see the topic Manage Mapping of Action Plan Status Values.

The following table shows the predefined Process Automation status values that are mapped with Action Plan status values.

Process State	Action Status
Active	ORA_SVC_IN_PROCESS
Completed	ORA_SVC_COMPLETED
Terminated	ORA_SVC_COMPLETED
Closed	ORA_SVC_COMPLETED

For more information about the global action status configuration, see topic Manage Mapping of Action Plan Status Values.

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You can use the **Status Mapping** tab on an action to override the global status mappings. For example, if the global rule is set to an action being closed when the status is complete, but instead you want it to be closed when it's canceled, you can override the global mapping so that the action closes when both conditions are met.

1. Click the **Status Mapping** tab.
2. Click the **Add** icon.
3. Select a status from the **Status** choice list. This becomes the status that ends up on the action.

   Status options include:

   - Blocked
   - Completed
   - In progress

   > **Note:** Apart from these three status values, you should not set up rules for any other status.

4. Select an attribute from the choice list.
5. Select an operator.

   Operators include:

   - Contains
   - Equals
   - `Is null`
   - `Is not null`

6. Select a value for the status.

Example of a Status Mapping

Let's say you want an action to be marked completed when a service request's status is completed or canceled.

The following table shows the values to enter on the Status Mapping tab.

Column	Value
Status This is the status you want the action to be.	Completed
Attribute This attribute comes from the SR.	Status
Operator	is one of
Value This is the request's status. You can select multiple values from the list.	Completed, Canceled

Dependencies Tab

When an action is added to a template, the **Dependencies** tab shows the template name. You use this to know what templates are impacted by a change to an action. If the action is in a template, you can also view and edit the template from this tab.

> **Note:** Edits made to templates don't affect active action plans that use the template.

Action Errors Tab

The **Action Errors** tab lets you to recreate actions for users when there are errors in action attribute mapping. For example, if the attribute in an attribute mapping is mapped incorrectly, the **Action Errors** tab is displayed. From the tab, you can see all the action plans that the action is used in, and after they're fixed, the action plan actions can be recreated directly from this tab.

This tab isn't used for Dynamic Process actions.

The Action Errors tab shows a table with the action plan number, action plan name, and the status details of the action.

Review the attribute mappings the action and correct the error. After attribute mapping for the action is corrected, you can return to the **Action Errors** tab and click **Recreate**.

Edit an Existing Action

To edit an existing action:

1. In the **Manage Action Plan Actions** task, select the template you want to edit.
2. Edit the action.
3. Click **Save and Close**.

How do I define access-group-based data security policies?

As a Customer Relationship Management Application Administrator you can define access-group-based data security policies on requests and cases. Though predefined data security policies are available, you've the option to define more data security policies based on access groups.

As compared to SQL-based data security policies, access groups are another way of granting data permissions to users. Instead of creating security policies using SQL, you can use object-sharing rules in the sales and service access management UI to define your visibility criteria.

For more information about creating data security policies, see the Access Groups chapter in the Oracle Fusion: Securing Sales and Service guide.

If you're replacing existing SQL-based data security policies with policies based on access groups, then remember to set an end date for those policies.

How do I manage relationships for action plans?

Action plans can have relationships to other objects. For example, an action can be blocked by another object, or a duplicate of another object.

About Relationships

Agents can create business-driven relationships between cases and leverage them to make updates across SRs cases. You must enable this feature in Functional Setup Manager.

Enable Relationships

To enable the Relationships feature:

In the Setup and Maintenance work area go to the following:

- Offering: Service
- Functional Area: Action Plans
- Task: Manage Action Plan Profile Options

1. Select the profile value **ORA_SVC_AP_ENABLE_OBJECT_LINK**.
2. In the drop-down list of the value, select Yes.
3. Click **Save and Close**.

Now, you can set the type of object link that's used for the relationship. For example, blocked, or duplicate.

1. Click the profile value **ORA_SVC_AP_DEFAULT_OBJECT_LINK_TYPE**.
2. Select the relationship type from the Profile Value drop-down list.
3. Click the **Add (+)** icon to continue adding the relationship types you want to use.
4. When you have finished, click **Save and Close**.
5. Click **Done**.

Manage Link Types

You can manage link types in the Manage Object Link Types task.

In the Setup and Maintenance work area go to the following:

- Offering: Service
- Functional Area: Service Request
- Task: Manage Object Link Types

To edit or disable the predefined object link type:

1. Click the link type in the list.
2. Make your changes. To disable, deselect the disable check box.
3. Click **Save and Close**.

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To create a link type:

1. Click **Create Link Type**.
2. Enter all the required information:
   - Name
   - Short Name
   - Outward Value
   - Inward Value
3. Select the check box to enable the type.
4. Click **Save and Close**.

Where do I find resources for analytics?

Here's where you can find *additional information* on Fusion Sales, Service, and Help Desk analytics:

- *Prebuilt Fusion Service analytics* spreadsheet.
- *Creating and Administering Analytics* guide.
- *Subject Areas for Transactional Business Intelligence in Fusion Sales and Fusion Service* guide.
- *Security for Sales Analytics and Reports* guide.
- *Securing Sales and Fusion Service* guide.
- *Oracle Transactional Business Intelligence* guides.
- *Fusion Service Report Sharing Center* cloud customer connect.
- *Analytics and Reporting Best Practices* support resource center.
- *R13.x CX OTBI Subject Area to Database Lineage Mapping Spreadsheet*
- *About Creating Your Own Subject Areas*

How do I use Adaptive Search for Case Management?

Adaptive Search is a high-performance search engine that provides keyword searching and enhanced filtering capabilities. Adaptive search is used on the Case List pages. To enable Adaptive Search for Cases, complete the following procedure:

1. In the Setup and Maintenance work area, open the **Configure Adaptive Search** task:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Configure Adaptive Search
2. On the Configure Adaptive Search page, click the **Setup** tab.
3. On the Setup tab, **Quick** subtab, select the case object to enable for Adaptive Search
4. Click **Publish**.

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Your action runs an indexing process and an hourly index refresh for the objects you selected. You can monitor the progress of the indexing process on the Monitor tab. The process can take several minutes to complete, depending on your data volume.

5. Click the **Monitor** tab and **Publish** subtab to monitor the process. If the process completes with errors, contact your help desk.

What role or privilege do I need to create a case?

In order for a user to access the Create Case page, administrators need to add the following privilege or roles:

Enable the user with one of the following:

- Create Case privilege
- Case Worker role
- Case Manager role

How can I create a case from an inbound email?

You can enable a feature in Case Management that allows cases to be automatically created from inbound emails from your customers.

How does it work?

When a case is created from an inbound email, the subject of the email becomes the title of the case. The body of the email is captured in the problem description, and creates a customer entry message as a conversation.

If the sender isn't known, based on a lookup of the email address, a case is created without a contact associated.

Once a Case is created, case workers have the ability to respond to that email from within the context of the Case. As case workers and the customer correspond, all information is captured as part of a conversation message thread.

How do I enable this feature?

Before configuring this feature, ensure that your inbound email is setup and configured properly. For the setup and configuration steps for inbound email see: *How do I set up inbound and outbound email?*

Once your inbound email setup and configured, you need to create a new channel.

> **Note:** You need to have Administrator privileges to create the channel.

1. Navigate to Setup and Maintenance.
2. Select the Service Offering.
3. Go to Communication Channels > Manage Communication Channels > Create Channel.
4. Enter all the requested information.
5. Set the **Purpose Code** to Case.

For more information about creating a communications channel see: *How do I configure an email channel?*

Now, when emails are sent into the email address identified in the **Account Name** a new case is created.

What privileges are needed?

Privileges Needed to Create a Case from an Inbound Email

Name	Code	Description
View Conversation Message	SVC_VIEW_CONV_MSG	Allows a user to view a conversation message.
Participate in Customer Conversation	SVC_PARTICIPATE_IN_CUSTOMER_CONVERSATION	Allows a user to participate in a customer conversation.
Participate in Collaboration Conversation	SVC_PARTICIPATE_IN_COLLAB_CONVERSATION	Allows a user to participate in a collaboration conversation.

Note: If the customer sends an initial inbound email that does not have a subject, the Case creation will fail since the title of the Case is a required field. If this is a concern, please contact My Oracle Support and they can provide you with a workaround.

In what table are cases and case activities stored?

Tasks and Appointments for all objects (including Cases) are stored in the Activities table **ZMM_ACTY_ACTIVITIES**. You find specific cases and appointments using the following:

A specific case task be found by:

- *SELECT * FROM ZMM_ACTY_ACTIVITIES WHERE ACTIVITY_FUNCTION_CODE = 'TASK' AND CASE_ID = <CASE_ID>;*

A Case appointment can be found by:

- *SELECT * FROM ZMM_ACTY_ACTIVITIES WHERE ACTIVITY_FUNCTION_CODE = ' APPOINTMENT' AND CASE_ID = <CASE_ID>;*

How do I enable household creation and manage households for cases?

Authorized case owners can use Households to manage groups of related individuals. Here's how to configure, create, and edit Households:

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Case edits can be made from the **Case Details** page to all key information about a Household including owner, address, contacts, and relationships.

- To add a Household, Case owners must have appropriate Case-related privileges (SVC_EDIT_CASE_PRIV', 'SVC_MANAGE_CASE_HOUSEHOLDS_PRIV) and Household-related privileges (ZCM_VIEW_SALES_GROUP_PRIV).

- To remove a Household or choose a Household as the Primary Household, Case owners must have appropriate Case-related privileges (SVC_EDIT_CASE_PRIV, SVC_MANAGE_CASE_HOUSEHOLDS_PRIV).

- To view and edit the details of a Household, Case owners must have appropriate Case-related privileges (SVC_MANAGE_CASE_HOUSEHOLDS_PRIV) and Household-related privileges (ZCM_VIEW_SALES_GROUP_PRIV', 'ZCM_UPDATE_SALES_GROUP_PRIV).

To Enable Household Creation: Create a Sandbox (including the Structure tool) > Structure > Sales > Households > Show in Navigator and Show in Springboard. (Your user must have the appropriate administrative privileges.) Optional: Move Households from Sales to Service or Help Desk.

To Create Households: Go the Sales springboard (or wherever you moved it) > Households > Create. (Your user must have the appropriate Household privileges.)

To Edit Households: Use the Households folder in the Case Details page. (Your user must have the Manage Case Households privilege.)

Can I use HCM Data Loader (HDL) or HCM Spreadsheet Data Loader (HDSL) to convert requests to cases?

Help Desk and Case Management don't use HDL/HSDL, but they use something similar to it known as Import and Export management.

You can find more information about Import and Export Management *here*.

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