Oracle Fusion Service Case Management

How do I get started with Case Management?

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Thanks for helping us improve our user assistance!

1 About Case Management

What is Case Management?

Case Management is a professional and collaborative process that provides the ability to manage long running processes to meet an organization's needs related to managing escallations, investigations, problems, applications, and other issues.

For example, a case is created whenever an application for specific services is requested by an applicant. Applications are typically assessed for eligibility of services, and upon successful assessment, a Case is created and managed. Unlike service requests, cases typically stretch over a long period of time, involve multiple parties as well as multiple documents and messages to deliver a solution or service, and often require complex business processes for successful completion.

The overall case management process is iterative, non-linear, and cyclical, with its phases being revisited as necessary, until the intended outcome is achieved. A Case can be different than a service request, as Cases are often employee, client, citizen, or student focused, and the outcome is often difficult to predict or measure. A case can be a process that ties together one or more services (benefits) delivered by an institution to a person (individual), group (household), or organization (customer account) to fulfill the specific intent and needs of the recipient.

2 What's do I need to do to get started with Case Management?

Must Do

These are the most critical tasks you must do to use Oracle Case Management. These include, assigning case job roles, setting the case stripe, and enabling case indexing.

Review Documentation

Review any existing documentation, tutorials, and videos. Start with these:

- *Oracle Help Center*.
- *Case Management in Help Desk*

  This requires a sign in to Cloud Connect. It's free!
- *Secure Site Videos for Visual Builder Studio*

  This site requires a sign in. Ask your Oracle contact for access.

  The Visual Builder Studio videos are in the Implement Next Gen Sales folder. (They do apply to case too!)

Assign Case Job Roles

The first thing you need to do is assign Case job roles to the appropriate users.

- Go to: Tools > Security Console > Users
  - Assign ORA_SVC_CASE_MANAGER and ORA_SVC_CASE_WORKER as appropriate
  - Oracle also recommends assigning the Resource Abstract and Employee Abstract roles. If the user will be performing administrative duties, assign the Service Request Administrator role.
- After assigning roles, optionally run these scheduled jobs in this order:
  a. Import User and Role Application Security Data
  b. Send Pending LDAP Request
  c. Retrieve Latest LDAP Changes
- Optionally, review predefined Case privileges for Case roles and make any changes to meet your specific requirements as needed. (This is coming in a future release)

Set Stripe

Set the default stripe for your Cases in Setup and Maintenance

- Navigate to: Setup and Maintenance and search for the task: Manage Case Profile Options > ORA_SVC_CASE_DEFAULT_STRIPE_CD (default value is CRM)
  - The Primary Contact picker on both the Create Case and Case Details pages displays:

        - Contacts for CRM stripe
        - Employees for HR Help Desk and Internal Help Desk stripes

Enable Indexing

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, enable indexing for cases in Setup and Maintenance.

- Setup and Maintenance > Search > Configure Adaptive Search
- Setup > Select Case > Go to Actions > Partial Publish

Should Do

These setup tasks are important for using Oracle Case Management, but aren't critical. For example, configuring the case list page, managing case types and case categories, configuring action plan features, and enabling case audit.

Configure the Case List Page

To configure the Case List page, go to:

- Setup and Maintenance > Search > Configure Adaptive Search > Configure UI > Case
    - Display in UI - Choose the appropriate columns and **Save**.
    - Enable for Group By - Choose appropriate columns and **Save**.

> **Tip:** Be patient. These changes can take a few minutes to take effect

Manage Case Types

To add or enable case types, go to:

- Setup and Maintenance > Search > Manage Standard Lookups > Lookup Type: ORA_SVC_CASE_TYPE_CD.
    - Common examples of case types:
        - Incident
        - Report
        - Assessment
        - Suggestion
        - Problem
        - Question
        - Complaint
        - Legal
        - User
        - Employee
        - Student
        - General
        - Unknown

- Undefined

Manage Case Categories

To add or enable case categories, go to:

- **For CRM Cases**: Setup and Maintenance > Service > Service Request > Manage Service Request Categories
- **For HR Help Desk Cases**: Setup and Maintenance > Help Desk > Help Desk Request > Manage Categories for HR Help Desk Requests.

Configure Action Plan Features

To enable cases in action plans, go to:

- **For CRM Cases**: Setup and Maintenance > Service > Case Management > Manage Case Profile Options: SVC_ENABLE_CASE_IN_ACTION_PLAN
- **For HR Help Desk Cases**: Setup and Maintenance > Tasks > Search > Manage Case Profile Options > SVC_ENABLE_CASE_IN_ACTION_PLAN.

Enable Audit

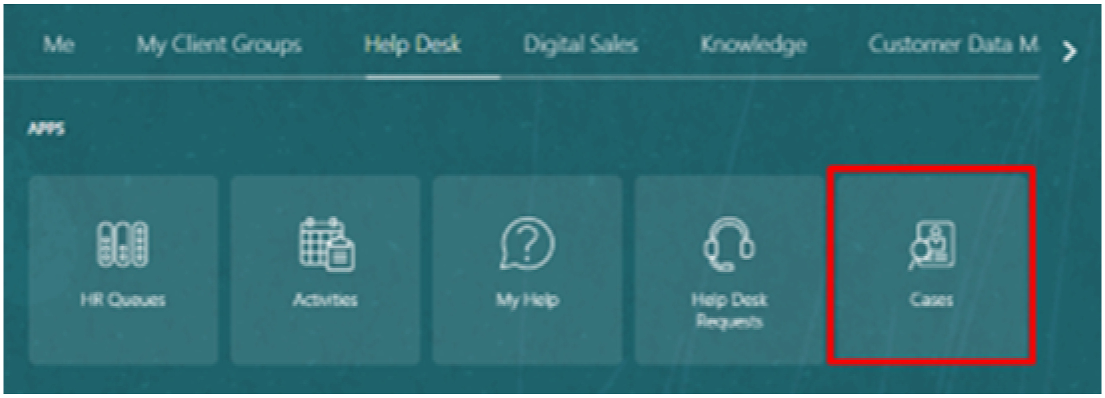
To enable audit for the case object, go to:

- Setup and Maintenance > Search > Manage Audit Policies
- Oracle Fusion Applications > Configure Business Object Attributes > Product > Service > Enable Case
  - Audited Attributes > Create > Verify desired attributes then **Save and Close**.
- Audit Level > Auditing > **Save and Close**.

Add Cases Icon

If you're using a release prior to 23D, add the **Cases** icon to the Help Desk section of the FUSE launch UI. To add the icon:

- Navigator > Sandboxes > Create a sandbox with Structure enabled.
- Navigator > Structure > Service > Duplicate Cases to Help Desk
  - For HR Help Desk Cases: Change the value Secured Resource Name to SVC_VBCS_View_Case_Access.
  - (Optional - available as of release 23D) Modify Page Parameters List with `?stripe=HRHD` and any other desired filters.
- Publish the Sandbox.
- Verify the icon is now appearing under Help Desk.



Could Do

Here are some Oracle Case Management features that are nice to have, but you can still use the application without them. For example: Manage case relationships, action plan actions, case queues and assignment rules, case households, case reporting, and build and implement case extensions.

Enable Relationships

Agents can create business-driven relationships between cases and use them to make updates across SRs cases. This is optional, but Oracle recommends enabling relationships.

> **Note:** Relationships are referred to as **Object Links** in the Admin UI.

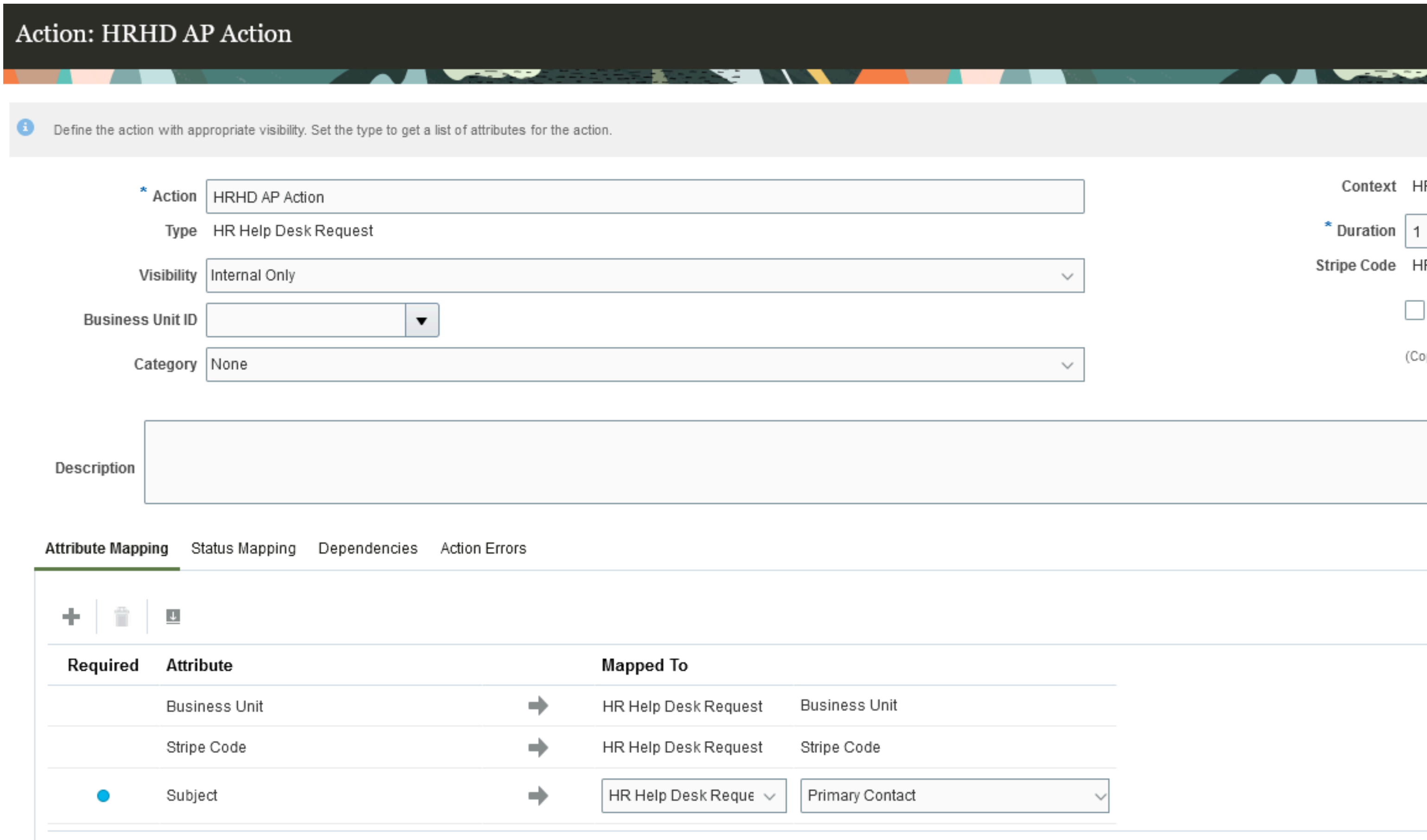
To enable relationships, go to:

- Setup and Maintenance > Service (or Help Desk) > Action Plans > Action Plan Profile Options
- Edit ORA_SVC_AP_ENABLE_OBJECT_LINK and ORA_SVC_AP_DEFAULT_OBJECT_LINK_TYPE.

Create Action Plan Actions

To create a case from a Service Request (SR) or a Help Desk Request, you can create action plan actions. To do this, go to:

- Setup and Maintenance > Service (or Help Desk) > Action Plans > Manage Action Plan Actions > Create Action
  - Common settings include:
    - Object Link Type
    - Copy Attachments
    - Primary Contact Party ID



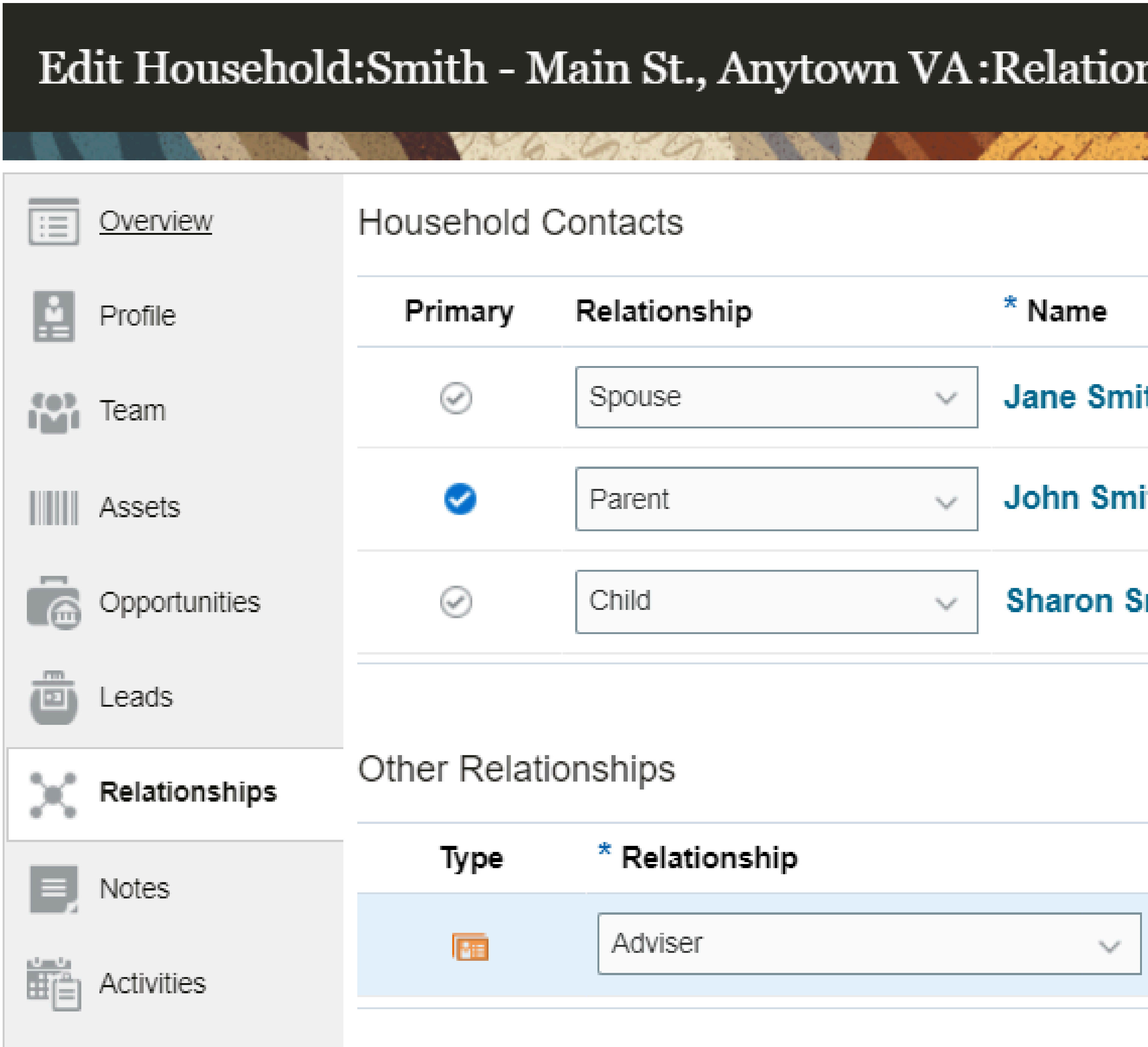
Create Case Queues and Assignment Rules

- **For CRM Cases**: Navigator > Service > Queues > Create Queue
- **For HCM Cases**: Navigator > Help Desk > HR Queues > Create Queue
- **For HR Help Desk Cases**: Setup and Maintenance > Search > Manage Queues for HR Help Desk Requests
- **For Internal Service Request Cases**: Setup and Maintenance > Search > Manage Queues for Internal Help Desk Requests
- **Assignment Rules (optional)**: See the document for *setting rules for queue assignments*.

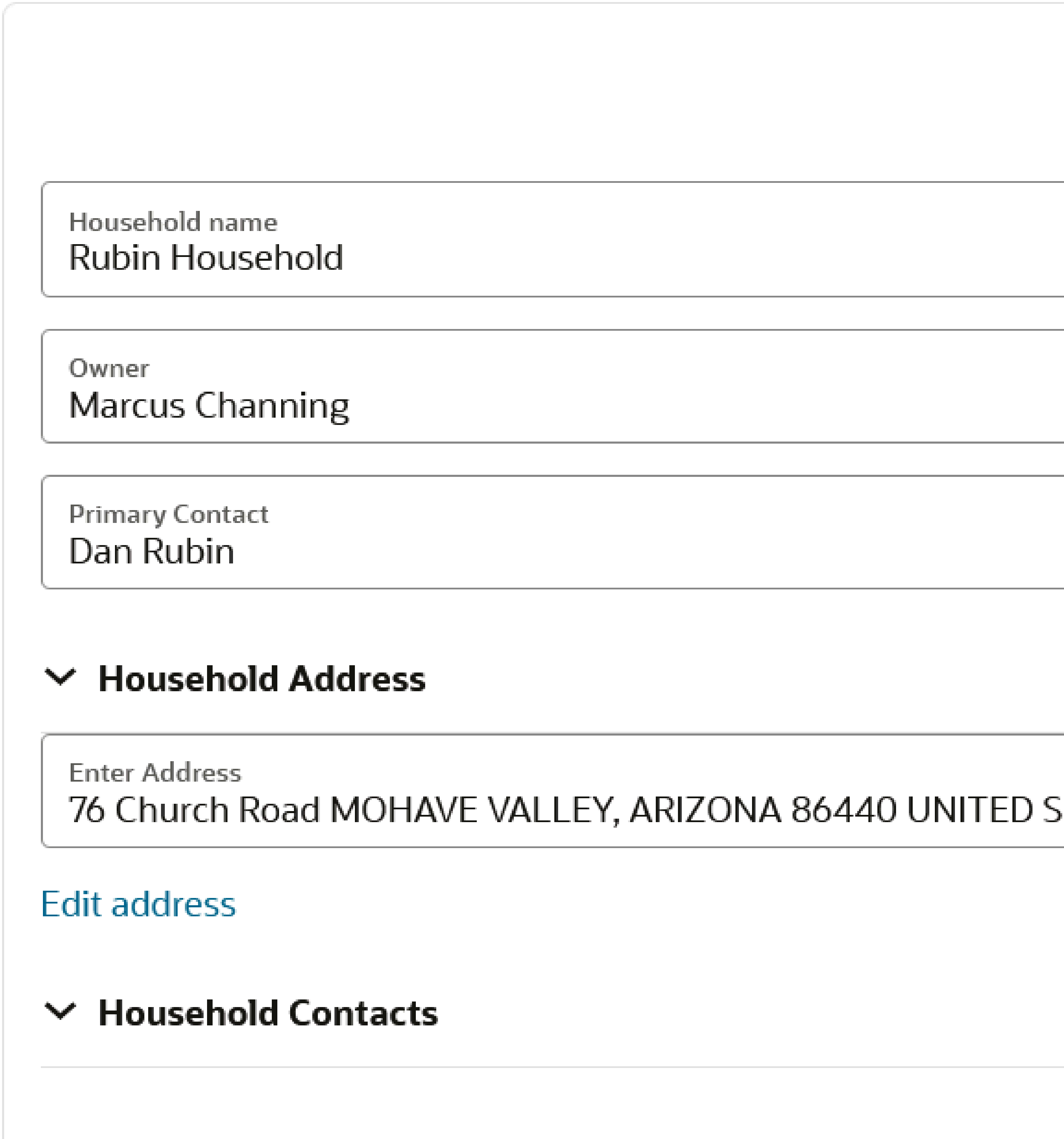
Configure Households

First, enable Household Creation by creating a sandbox (including the **Structure** tool. Create Sandbox > Structure > Sales (or Service, or Help Desk) > Households > Show in Navigator and Show in Springboard.

To Create Households: From the Springboard: Households > Create


Edit Household:Smith - Main St., Anytown VA :Relation
Overview
Profile
Team
Assets
Opportunities
Leads
Relationships
Notes
Activities
Household Contacts
Primary
Relationship
* Name
Spouse
Jane Smit
Parent
John Smi
Child
Sharon S
Other Relationships
Type
* Relationship
Adviser

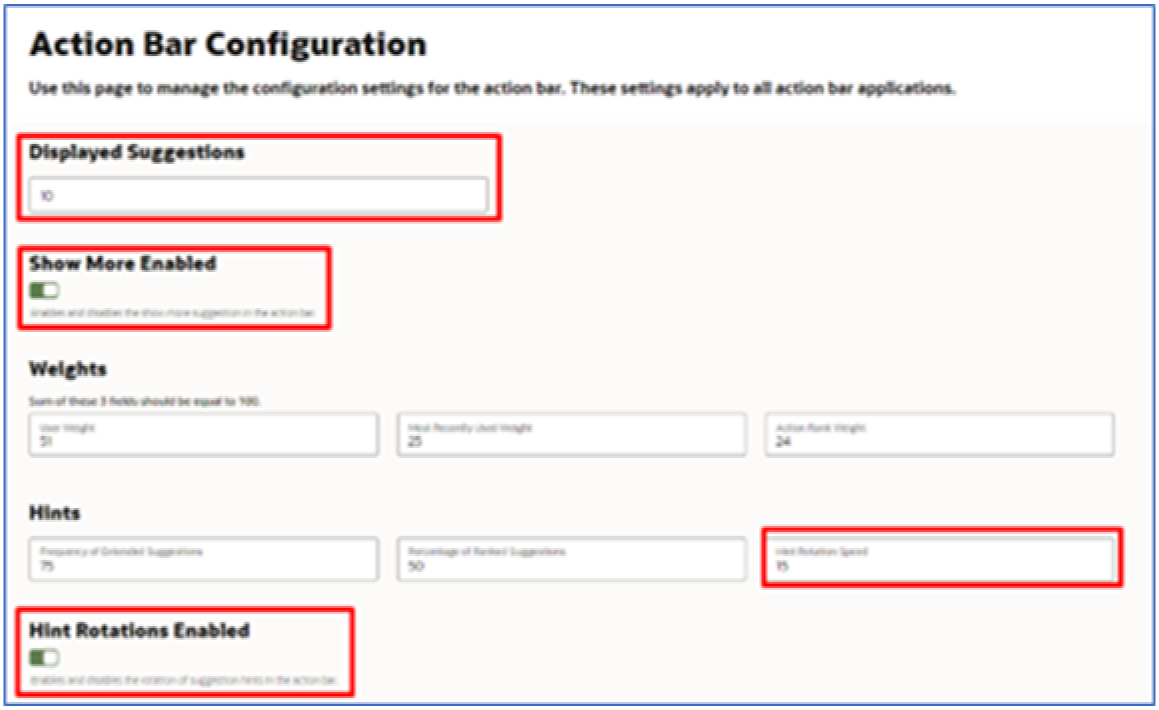
To Edit Households: Use the Households folder in the Case Details page.



Note: Users must have the Manage Case Households privilege to create and edit households.

Configure the Action Bar

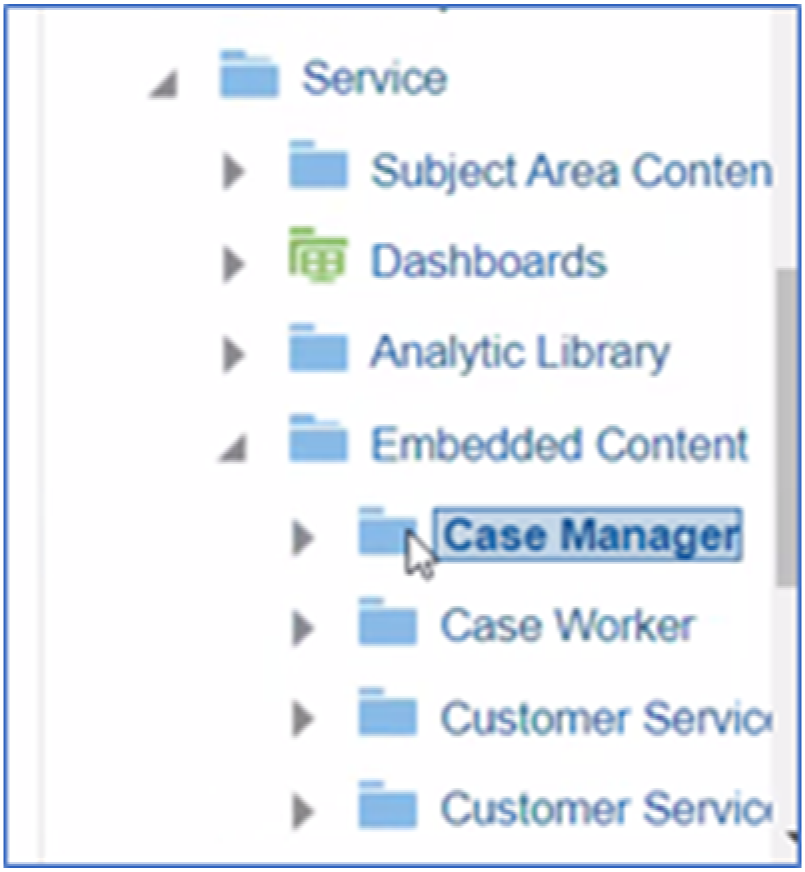
- Go to https://[your server]/fscmUI/redwood/service/ec/container/sr/assistant-admin
  - This page requires the privilege ZCA_MANAGE_SENSING_AGENT_PRIV.
- Common changes are highlighted in the following image. More configuration information can be found in the *What's New Section for release 23B* on Cloud Readiness Service Center.



Review Reporting for Cases

- Navigate to: Reports and Analytics > Browse Catalog > Shared Folders > Service > Embedded Content > then all the Case subject areas.

  Note: All the Case subject areas are for cases of all stripes including Service and Help Desk.

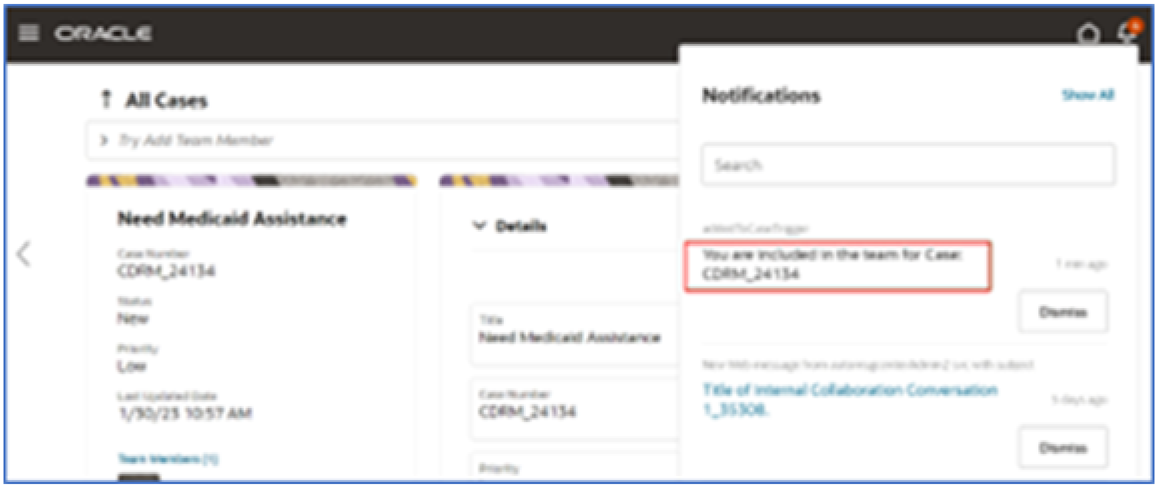


Build Extensions in Oracle Visual Builder Studio

- **Action Plan Automation**: Ask your Oracle contact for sample code.
- **Conditional Data/Folder**: Ask your Oracle contact for a demonstration of an example.

Implement Extensions in Application Composer

- Send Notification when a user is added to a Case:

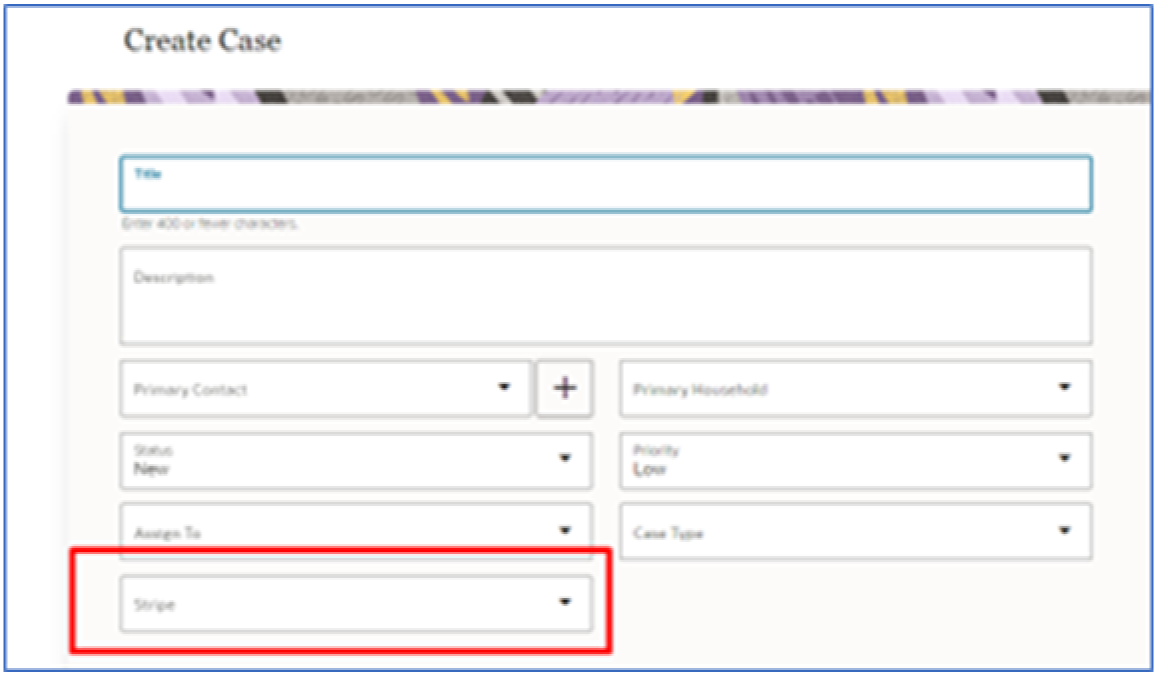


  - Navigator > Sandboxes > Create a Sandbox (with Application Composer enabled)
  - Navigator > Application Composer > Standard Objects > Case > Case Resource > Triggers > Action > Add > Before Insert in Database
  - See the sample code in the next topic.
  - Publish the sandbox.
- Run Queue Assignment rules: Ask your Oracle contact for sample code.

Change the Create Case UI*

*For releases before 23D change the create case UI for using the appropriate stripe.

- For CRM Cases: No modification is required. Cases will be automatically striped for CRM.
- For HR Help Desk Cases or implementations using multiple stripes, add the case **Stripe** attribute to the UI using Visual Builder Studio.
- Optionally, add the **Stripe** field to the UI and assign a default value that matches your preferred stripe. Such as HR Help Desk.



Configure an Email Channel

To send to and receive emails from customers, set up an email channel.

For more details, see the topic *How do I configure an email channel?*

3 Sample Code

How do I send notifications when a user is added to a case?

If you want to send a notification when a user is added to a case, you can use this sample code.

Sample code:

```
try {

 println("Preparing data to send notification.");

 def map = new HashMap();

 // Specify default MessageText
 def messageText = "You are included in the team for Case: " + CaseNumber;

 // Specifying the recipient
 def recipientPartyId = PartyId;

 // Resolving Parent child object relation
 def objectCode='CaseVO';
 Long objectId = CaseId;

 // Specify one or more channels
 map.put("Channels",["ORA_SVC_BELL"]);

 map.put("MessageText", messageText);

 // The following can be used to pass a Long PartyId
 map.put("RecipientPartyId", recipientPartyId);
 map.put("ObjectCode", objectCode);
 map.put("ObjectId", objectId);

 if (recipientPartyId) {
 // Call to send notification
 println("Sending notification...");
 adf.util.sendNotification(adf, map);
 println("Notification sent to user id: " + recipientPartyId);
 } else {
 println("No recipient. Notification will not be sent.");
 }
} catch (e) {
 // Log the failure in groovy logging. Logs can be viewed in 'RuntimeMessages'.
 println("Failure to trigger notification from Groovy Script " + e.getMessage());
}
```