Oracle Fusion Service

How do I get started with Interviews in Fusion Service?

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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Use help icons ⓘ to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

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Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*. Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

1 Implementation Summary

Before You Start

Verify that you are subscribed to either Sales, Service, or Helpdesk service and that you received an email with your environment and initial sign-in information.

Case Study

In this playbook, a case study is used to define the scope of the implementation tasks and illustrate their interdependence.

The case study is based on a fictitious company named Vision Corp., a global high-tech company that sells laptop and multiple server product lines to businesses and other organizations. The company creates service tickets on its website that can be used by its customers to troubleshoot their products. The company would like its author users to use Interviews to create and manage guides and intake forms to provide interactive advice, troubleshooting steps, and collect information. Vision Corp. would like its authors to use Interviews to author guides and intake forms.

Implementation Overview

You can use this playbook to kickstart Interviews implementation. Implementing Interviews enables you to do the following:

- Design custom intake forms to collect information from your customers.
- Provide interactive advice and guides.

At a high-level, here's what you need to do to implement Interviews:

- Get Started With Setting Up Interviews
  - *Get your Cloud Account Details from the Welcome Email*
  - *Enter the Promotion Code*
  - *Enable the Interview Definitions Functional Area*
  - *(Optional) Enable Assisted Authoring*
  - Set Up Interview Users. See: *Interview Users and Roles*
- Verify Implementation
  - *Author Interviews*
  - *Publish an Interview*
  - *Embed Interviews in a Redwood Knowledge Article*

This graphic describes the steps for implementing interviews.

What you can do after completing the Interviews setup tasks

- Design custom intake forms, such as forms to record troubleshooting content by collecting information from your customers, and provide interactive guidance. See: *Author Interviews*
- Make these forms available for use to the application users. See: *Publish an Interview*
- Optionally, embed these forms in Knowledge articles: See: *Embed the Interviews in a Redwood Knowledge article*

2 Get Started With Setting Up Interviews

Get your Cloud Account Details from the Welcome Email

When you subscribe to Sales, Service, or Helpdesk, an initial user is created for you.

This initial user has the Application Implementation Consultant role, and can enter the promotion code, enable Interview Definitions, and provide access to Redwood UIs. You get your cloud account details and sign in credentials through a welcome email.

Let's help Vision Corp get started! In this use case, for Vision Corp., Bonnie Vickers is set up as the initial user.

User Name	Job Roles	Implementation Tasks	Description
Initial User: Bonnie Vickers	**Application Implementation Consultant role**	Enter the promotion code Enable Interview Definition Provide access to Redwood User Interfaces	When you subscribe to Fusion Interviews, an **initial user** is created for you. You get your cloud account details and sign in credentials through a **welcome email**

Enter the Promotion Code

Let's set the ball rolling. Sign-in into your application environment as an initial setup user with Application Implementation Consultant role, such as Bonnie Vickers.

Before you proceed, ensure that you have the promotion code handy.

Note: If you don't have a promotion code for Fusion Interviews, file an SR with Oracle Support.

Here are the steps for you to enter the promotion code:

1. Click **Navigator** > **My Enterprise** > **Enterprise**.
2. On the Enterprise Information page, click the Manage Promotion Codes link.
3. On the Manage Promotion Codes page, click Enter Promotion Code.
4. On the Enter Promotion Code dialog box, enter the promotion code and click Save and Close.

The application displays Interview Authoring Promotion Code in the list of promotion codes.

Enable the Interview Definitions Functional Area

The next task that you need to perform, is to opt into the offering that enables the Interview Definitions functional area.

Signed in as an initial user with Application Implementation Consultant role, such as Bonnie Vickers, complete these steps:

1. Click the profile icon on the Home page and select **Setup and Maintenance** under **Administration**.
2. Select **Service** offering from the Setup drop-down list.
3. Click the **Change Feature Opt In** link beside the Functional Areas heading.
4. Select **Interview Authoring** feature.
5. Click **Done**.

Now, you have access to the Interview Definitions functional area.

Enable Assisted Authoring

You can enable the assisted authoring option to use questions or steps suggested by Artificial Intelligence (AI) while creating interviews.

This step is optional and is needed only if you plan to use AI suggested content in your articles. You can always choose to enable this option at a later time.

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance** work area.
2. Click the Tasks menu and click **Search**. Search for Manage Profile Options task and open it.
3. Search for the Enable Interview AI Suggestions profile option using the ORA_OIA_INTERVIEW_AI_SUGGESTIONS_ENABLED profile option code.
4. Select **Enabled** as the profile value.
5. Click **Save and Close**.

   Note: Changes in the profile values affect users the next time they sign in.

Set Up Interview Users

Interview Users and Roles

These roles and privileges are needed for embedding interviews as articles in Service Center, Case Management, Helpdesk, and Knowledge:

User Name	Job Roles	Feature	Privilege	Description
Author User: Braun Travis	**Customer Service Manager** **Case Manager** **Knowledge Manager** **Next Gen Human Resource Help Desk Manager**	Fusion Service Case Management Knowledge Helpdesk	ORA_SVC_CUSTOMER_SERVICE_MANAGER ORA_SVC_CASE_MANAGER ORA_CSO_KNOWLEDGE_MANAGER_JOB ORA_SVC_HUMAN_RESOURCE_HELP_DESK_MANAGER_NG	Embed interviews as an **action plan** in Service Center. Embed interviews as an article in **Case Management**, **Helpdesk**, and **Knowledge**

3 Verify Implementation

Author and Publish Interviews

After performing the steps to enable Interview Definitions functional area and, optionally, enabling Interview AI Suggestions for assisted authoring, you can start creating and managing interviews.

Verify that your Interviews implementation was successful by clicking **Navigator** > **Service** > **Interview Definitions** and perform these tasks.

- *Author Interviews*
- *Publish an Interview*
- *Embed Interviews in a Redwood Knowledge Article*

This graphic depicts the steps for authoring, publishing, and embedding interviews.


1
Author Interviews
Author User:
Braun Travis
Roles Required (Any)
Customer Service Manager
Case Manager
Knowledge Manager
1 Navigator
2 Service > Interview Definition
3 Create Interview
2
Build your Interview
Author User:
Braun Travis
Roles Required (Any)
Customer Service Manager
Case Manager
Knowledge Manager
1 Create an Introduction Page
2 Create Branching Questions
3 Create Follow Up Steps
4 Create Solutions
5 Final Page
3
Publish an interview
Author User:
Braun Travis
Roles Required (Any)
Customer Service Manager
Case Manager
Knowledge Manager
Where?
1 Interview Definition
2 Select an Interview
3 Publish
4
(Optional) Embed Interviews in a Redwood Knowledge Article
Author User:
Braun Travis
Roles Required (Any)
Customer Service Manager
Case Manager
Knowledge Manager
Where?
1 Knowledge Authoring page
2 FAQ
3 Fill required fields
4 Menu > click Link
3 Select the Interview

Author Interviews

After Interviews is successfully set up, you can use Interviews to author guides and intake forms.

You can create tickets on your organization's website to help customers. For example, a customer is facing a "no sound" issue on their laptop. You can use Interviews to create a troubleshooting content for resolving the "no sound" issue on your customer's laptop, using the Troubleshooting Template. You can convert your troubleshooting content into a ticket if the guidance doesn't resolve the issue.

Sign in as an Author User, such as Braun Travis, and follow these steps to create your troubleshooting article:

1. Go to **Navigator** > **Service** > **Interview Definitions**.
2. Click **Create Interview**.

    > **Note:** The authoring page has two modes; Edit mode and View mode. The Edit mode is only available when you have edit permission and the interview isn't checked out by another user.

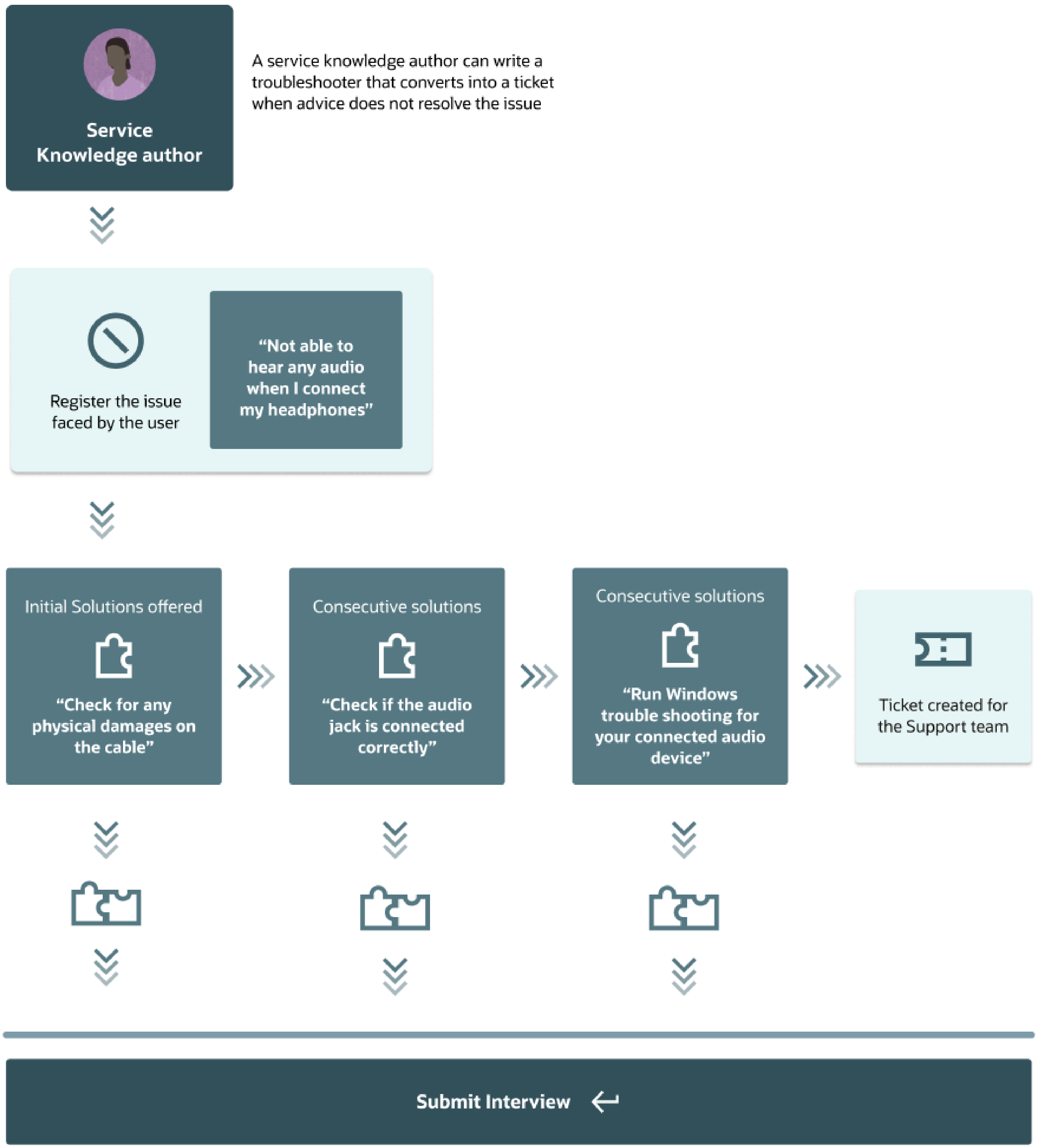
3. Use the following options to author your troubleshooting article.
    - Introduction page
    - Branching questions and responses
    - Solutions
    - Followup Steps
    - Branching Questions
    - Data Collection page
    - Final Page
4. Click **Save**.

    > **Note:** Use Assist AI to let AI generate the troubleshooting content. Use Author's notes to add any comments that shouldn't be visible to the user. This is useful when you are designing and collaborating with other interview authors or for storing some details about the troubleshooting content.

Interview Authoring Example: Convert Troubleshooting Content to a Ticket

Suppose Vision Corp wants to build a troubleshooting article which helps customers to resolve issues with their laptop.

This graphic describes how you can write troubleshooting content that converts into a ticket when guidance doesn't resolve the issue:



Signed in as an Author User, such as Braun Travis, you can use these steps to author a troubleshooting article for the "no sound" issue on a laptop:

1. Use the Introduction page to welcome the customer.
2. Use the Branching questions and responses to gather information about the product. For example, use a branching question to find if the customer has an issue with their laptop or desktop.
3. Use Follow up Steps to gather more information about the issue. Follow up Steps can be of the following type:
    a. Branching Questions: Use further branching questions to gather information about the product such as the model information and so on. You can then gather information about the issue.
    b. Use the Data Collection page to gather any information from the customer to log a ticket.
4. Use Solution option to provide the following possible solutions to the issue. If a solution works, go to the next step. Otherwise, continue with the sequence of troubleshooting steps.
    a. Check the audio ports for damage, and clean the ports
    b. Restart your laptop
    c. Check the connection (external speakers, headphones, or earphones)
    d. Check volume settings and set the default playback device for low or no sound
    e. Run the Microsoft Sound Troubleshooter
    f. Reinstall or Update the chipset, audio, and BIOS drivers
    g. Run a hardware diagnostic test
    h. Download and install Microsoft Windows updates
    i. Perform Windows System Restore
    j. Restore the computer to factory default settings
5. Use the Final Page to complete the Interview and direct the agent to next steps.

Publish an Interview

Publishing an interview makes it available to all application users.

Sign in as an Author User, such as Braun Travis, and follow these steps to publish an interview:

1. Select and right-click an interview.
2. Click **Publish**.

    > **Note:** You can also Edit, Delete, Check in, Check out, and Unpublish an interview.

Embed Interviews in a Redwood Knowledge Article

You can embed the interview you created in Interview Definitions functional area in a Knowledge article.

This helps you reuse interviews, for example the laptop troubleshooting article, as a knowledge article and avoids the hassle of creating another knowledge article from scratch in Knowledge.

1. Click **Knowledge** > **Authoring**.

    The Knowledge Authoring page opens.
2. Click **Create Article** and select **FAQ**.

3. Specify the required fields.
4. Click the action menu, click the **+** icon, and click Link.

   The Add an Interview popup box appears.
5. Select the interview and the locale.
6. Click **Add**.

   You can see a placeholder of the interview added in your article. However, you can't see the actual content of the interview while you are editing the article.
7. Click **Save**.

   The content of the interview appears in the article.
8. Publish your article.