

# Oracle Fusion Cloud Applications

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**Using Help Desk**



Oracle Fusion Cloud Applications  
Using Help Desk

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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.

## Get Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

## Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

## Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

## 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](mailto:oracle_fusion_applications_help_ww_grp@oracle.com).

Thanks for helping us improve our user assistance!



# 1 About This Guide

## Audience and Scope

This guide provides an introduction to the Help Desk application and explains the principles of using the interface for Employees and Agents.

The activities in this guide are only available if the implementation tasks for Help Desk are complete.

## Related Guides

The following table is a list of guides related to Help Desk.

Title	Description
<i>Oracle Fusion Cloud Applications Implementing Help Desk</i>	Contains information and procedures needed by your administrators to implement and extend the Help Desk Center application.
<i>Oracle Fusion Service Using Knowledge Management</i>	This guide is intended for authors, agents, and self-service users working with knowledge management features and components.
<i>Oracle Fusion Service Implementing Knowledge Management</i>	Describes how to set up Knowledge Management.
<i>Oracle Fusion Cloud Applications Using Common Features</i>	This guide is for anyone who's using the application. Use it to learn how to do general tasks that apply to some or all product families. If you're looking for product-specific information, refer to the product-specific guides.
<i>Oracle Fusion Cloud Applications Creating and Administering Analytics and Reports</i>	This guide shows how you can create analyses in the Reports and Analytics work area, personalize the infolets on your home page, or configure flexfields for use in analytics.



## 2 The Basics

### Navigating Help Desk

#### How You Navigate To Help Desk

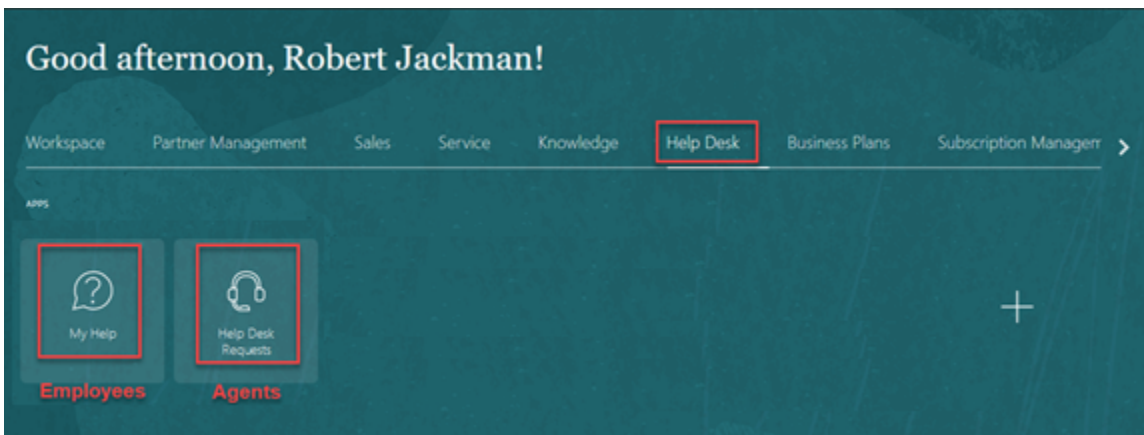
From the Home page, you can navigate to the Help Desk work areas to search knowledge and view and create requests.

On the Home page, click the **Help Desk** and then:

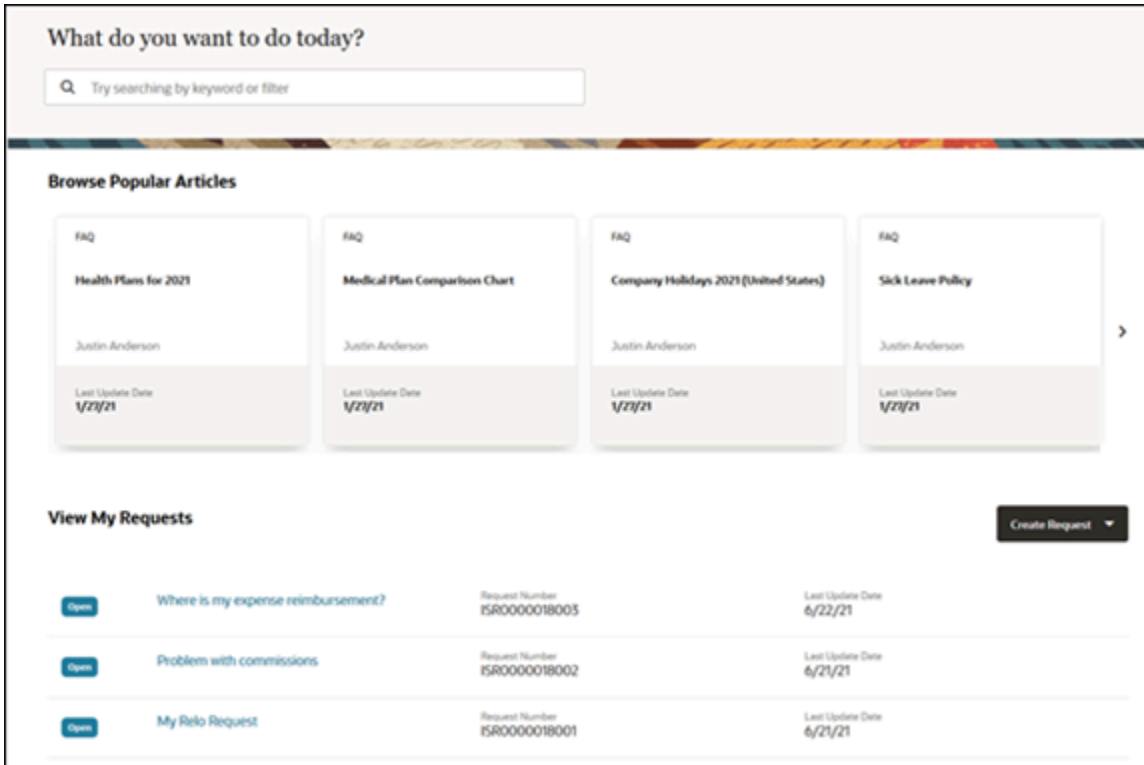
- if you're an employee, click **My Help**.
- if you're an agent, click **Help Desk Requests**.

Alternatively, you can click Navigator > Help Desk.

If you don't see the **Help Desk** navigation icon on the Home page, contact your administrator to enable the **Help Desk User Interface** opt-in feature. For more information, see the Oracle Fusion Cloud Applications Oracle Cloud Implementing Help Desk guide.



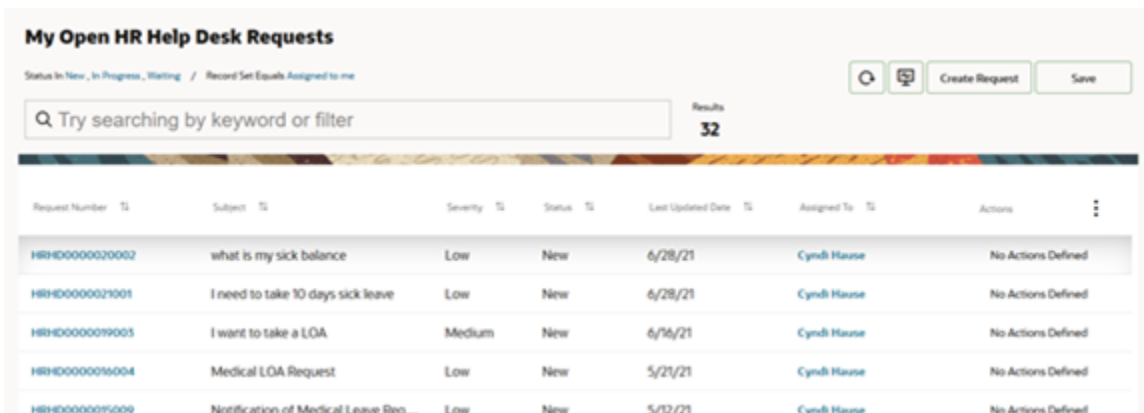
For Employees: The **My Help** page is displayed.



**My Help** is the employee landing page. Here, you can:

- Browse Popular Knowledge Articles
- Search for Knowledge
- View list of My Help Desk requests
- Search for a Help Desk request by typing in a keyword
- Use the **Create Request** button to create a Help Desk request

For Agents: The **Help Desk Requests** page is displayed.

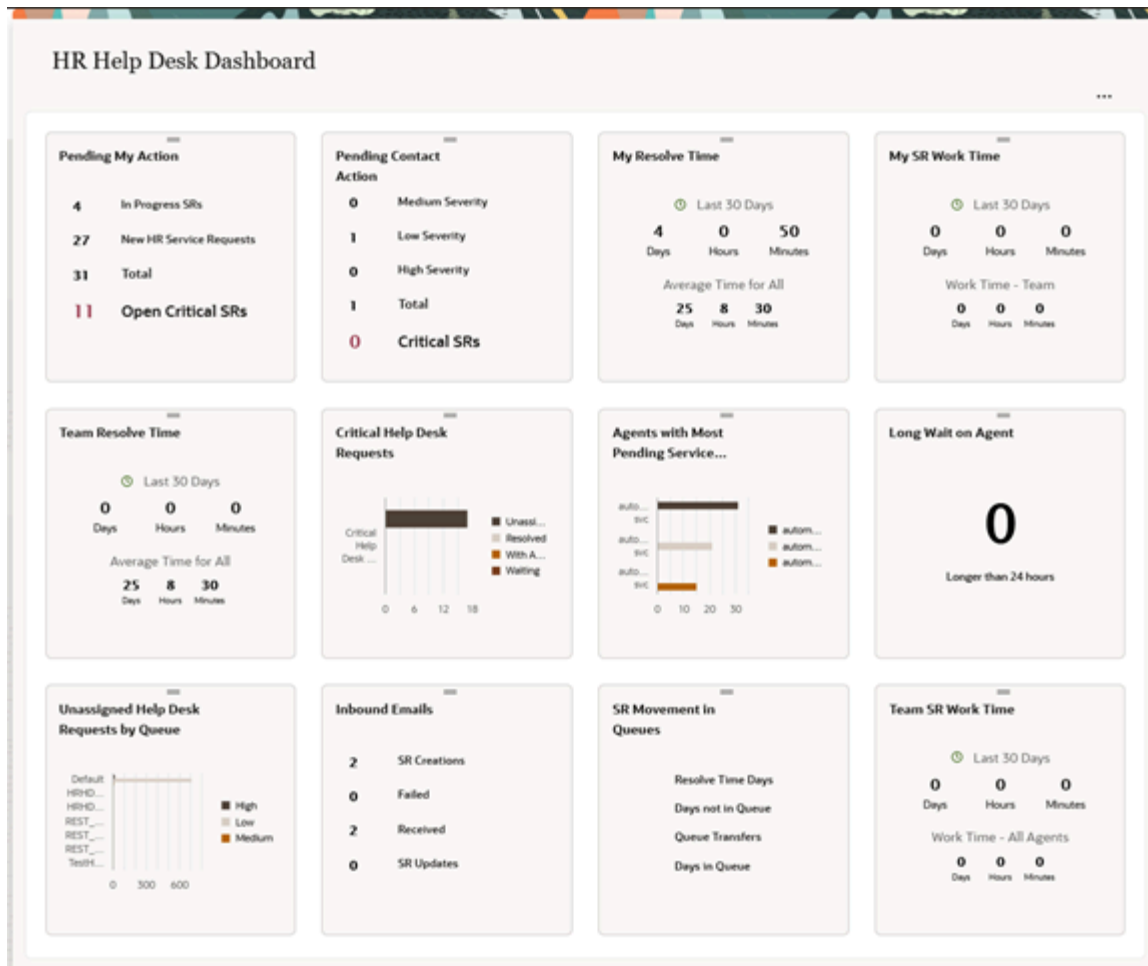


**Help Desk Requests** is the agent landing page. Here you can:

- Select another Saved Search
- Search for a Help Desk request

- Refresh the page
- Use the **Create Request** button to create a new request
- Use the **Save** button to save a new search
- View list of My Open Help Desk Requests (default)
- Drill into the details of a request

- Use the **Dashboard** icon to open a new browser tab that shows your dashboard. Depending on your role, the infolets that apply to you will be displayed. For example:
  - Pending My Actions
  - Pending Contact Actions
  - My Resolve Time
  - My SR Work Time
  - Team Resolve Time
  - Critical Help Desk Requests
  - Agents with Most Pending Service Requests
  - Long Wait on Agent
  - Unassigned Help Desk Requests by Queue
  - Inbound Emails
  - SR Movement in Queues
  - Team SR Work Time



For more information about how to use the infolets, see the *Work with Infolets* topic in the Using Service Center Guide.

## Notifications

### Review Notifications

Here's an overview of how the Bell and Omnichannel notifications work in the application. Specific notifications are predefined by your administrator or manager.

#### Bell Notifications

The **Notifications** (bell) icon on the global header indicates the number of notifications you've received. As an agent, you can get notified about help desk requests assigned, service requests escalated, and other important events that require your attention.

**Note:** To open a notification in the Redwood user interface, your administrator must have assigned the `SVC_NAVIGATE_TO_SERVICE_CENTER_FROM_NOTIFICATIONS_PRIV` privilege to you.



Here's how you can check your notifications:

1. Start on the Home page.
2. Click **Notifications** (the bell icon) to view all bell notifications.

The **Notifications** window is displayed.



3. Do any of these:
  - o Search for notifications by keyword.
  - o Click a notification link to take further action on that record. You can drill into a help desk request's details. For example, clicking on a notification about a help desk request that's escalated, takes you to the activity feed for that request.

- Click **Dismiss** to remove a notification from the list.

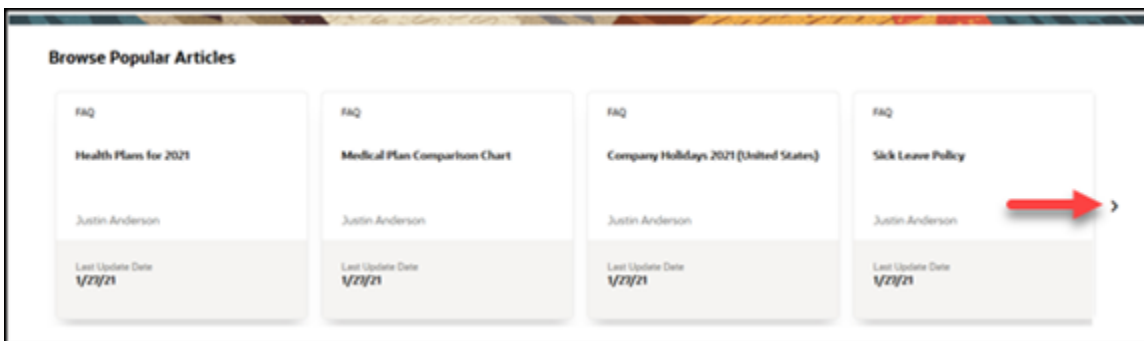
After you click the notification link or click **Dismiss**, the notification is marked as read and it's cleared from the notification list.

# 3 My Help for Employees

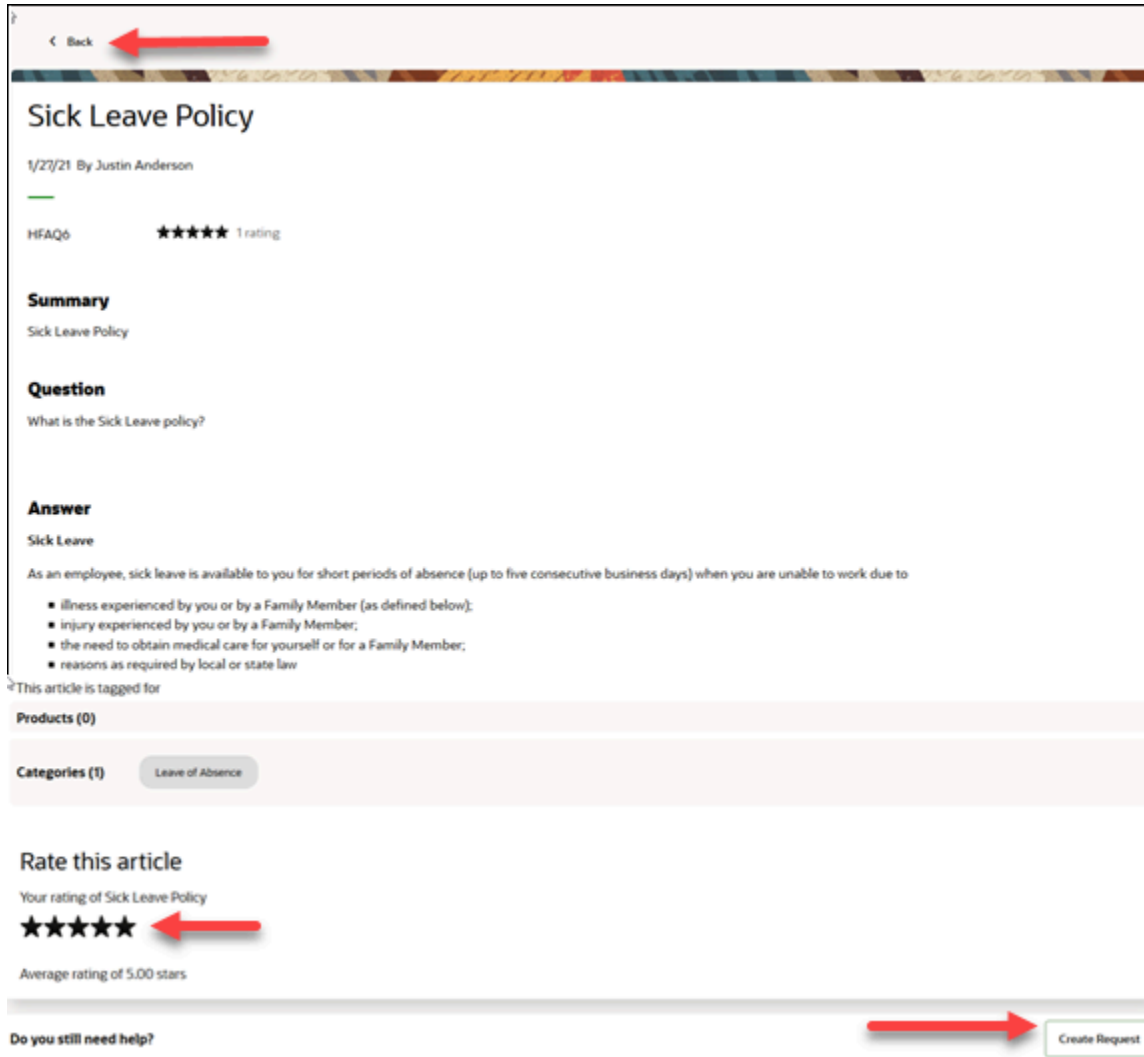
## Knowledge

### Browse Popular Articles

The Browse Popular Articles section on the My Help page displays articles that are popular with other users.



Use the arrow icon to scroll through popular articles or click on one of the articles to view the details.

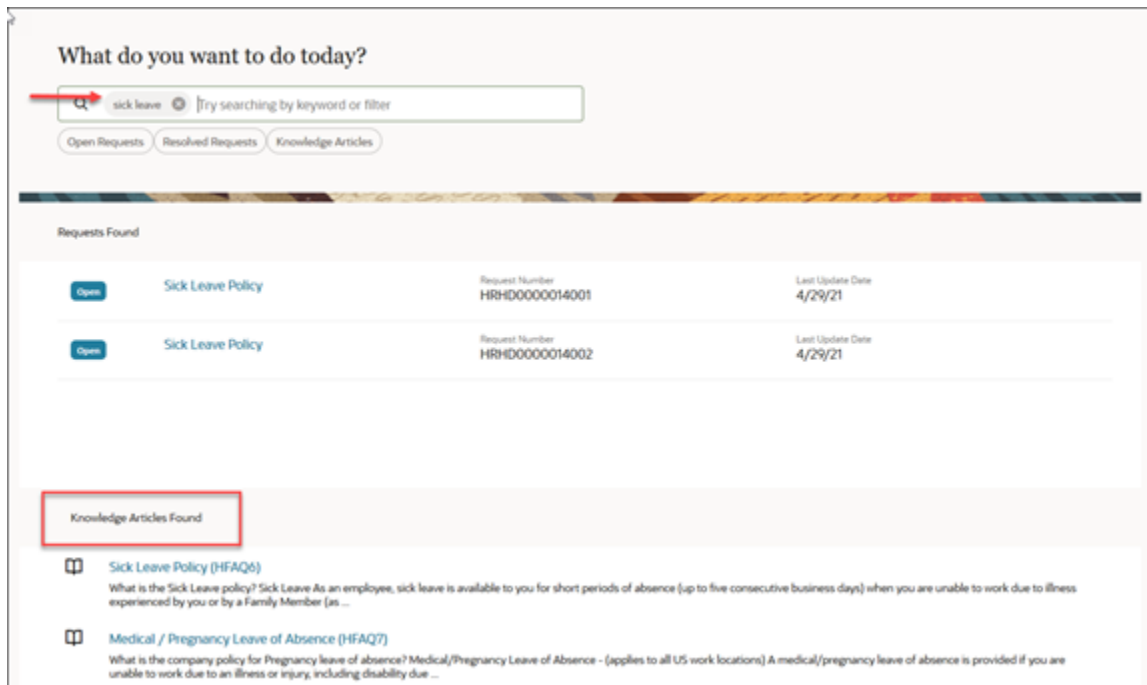


If you choose to create a new request, the category and product of the new request defaults to the same category as the article.

## Search Knowledge

If you don't see any articles related to your request in the popular articles section, you can search for an article.

Let's search for an article about sick leave.



1. Enter a topic in the search bar.

In this example, we entered sick leave.

Notice the filters below the search bar showing open requests, resolved requests, and knowledge articles. You can hover over any one of those and click to close them if you want to limit the search results.

After the results of your search are returned, the requests related to sick leave are displayed and then related articles are shown.

2. Click on the article to review the details.

The screenshot shows a mobile-style interface for a help article. At the top left, there is a back arrow labeled 'Back' with a red arrow pointing to it. The article title is 'Sick Leave Policy', dated '1/27/21 By Justin Anderson'. Below the title is a rating section showing 'HFAQ6' with five stars and '1 rating'. The article is divided into sections: 'Summary' (Sick Leave Policy), 'Question' (What is the Sick Leave policy?), and 'Answer' (Sick Leave). The answer text states that sick leave is available for short periods of absence (up to five consecutive business days) when unable to work due to illness, injury, or the need for medical care, or as required by law. Below the answer, there are sections for 'Products (0)' and 'Categories (1)' with a tag for 'Leave of Absence'. A 'Rate this article' section shows a five-star rating with a red arrow pointing to it, and an 'Average rating of 5.00 stars'. At the bottom, there is a 'Do you still need help?' prompt with a red arrow pointing to a 'Create Request' button.

From here, you can go back to My Help, rate the article, or create a new request.

If you choose to create a new request, the category and product of the new request defaults to the same category as the article. This is shown in the following figure.



This article is tagged for

**Products (0)**

**Categories (1)**    Leave of Absence ←

**Rate this article**

Your rating of Sick Leave Policy

★★★★★

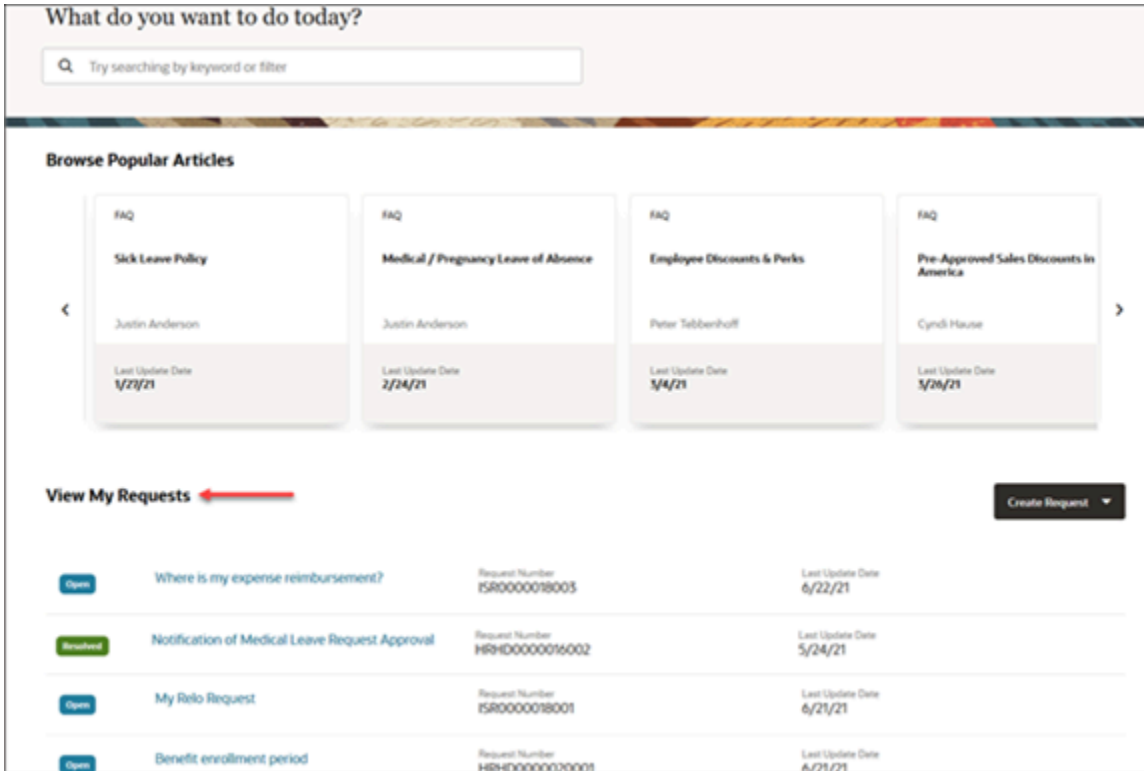
Average rating of 5.00 stars

The screenshot shows a user interface for tagging and rating an article. At the top, it says 'This article is tagged for'. Below this, there are two sections: 'Products (0)' and 'Categories (1)'. Under 'Categories (1)', there is a button labeled 'Leave of Absence' with a red arrow pointing to it from the right. Below the tagging section, there is a 'Rate this article' section. It asks for a rating of 'Sick Leave Policy' and shows five filled stars. At the bottom of this section, it states 'Average rating of 5.00 stars'.

## My Help Desk Requests

### Help Desk Request List

After the Browse Popular Articles section on the My Help page, there is a list of your open and resolved help desk requests.



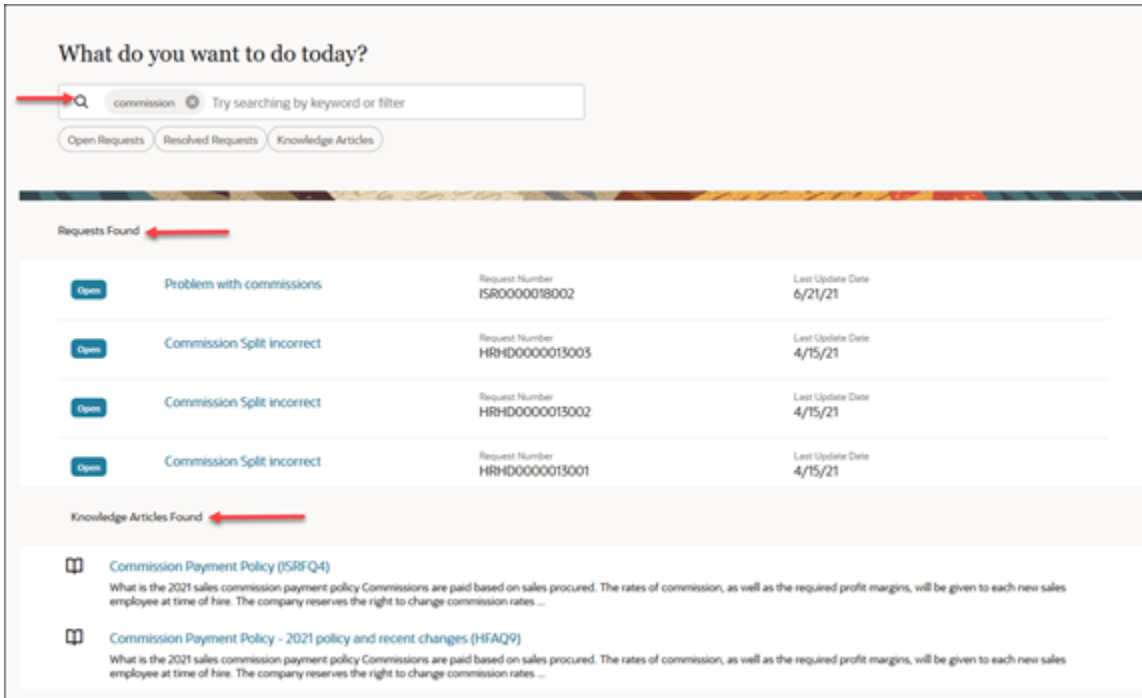
If you would like to see the details of one of your requests, just click the name of the request.

## Search Help Desk Request

If you don't see the request you're looking for in the list on the My Help page, you can do a more detailed search. Here's how:

Let's search for all my requests about commission.

Enter "commission" in the search bar and click the search icon.



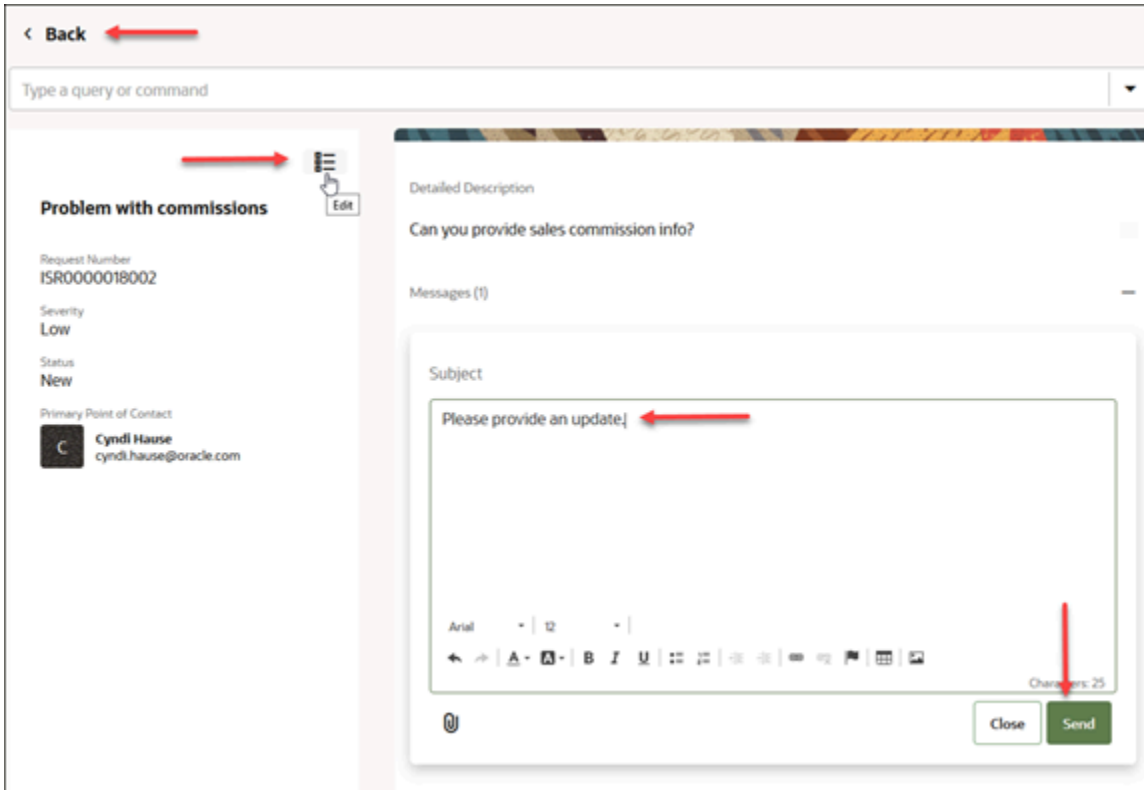
The returned results shows a list of all your requests containing the word commission. In addition the related knowledge articles are shown after the request list.

Remember you can always narrow the search by hovering over the filters below the search bar and removing them.

If you want to see details of one of your requests, click the name of the request.

## Help Desk Request Details Page

On the Help Desk Request Details page, you can review the help desk request, add messages, copy, or edit the request.

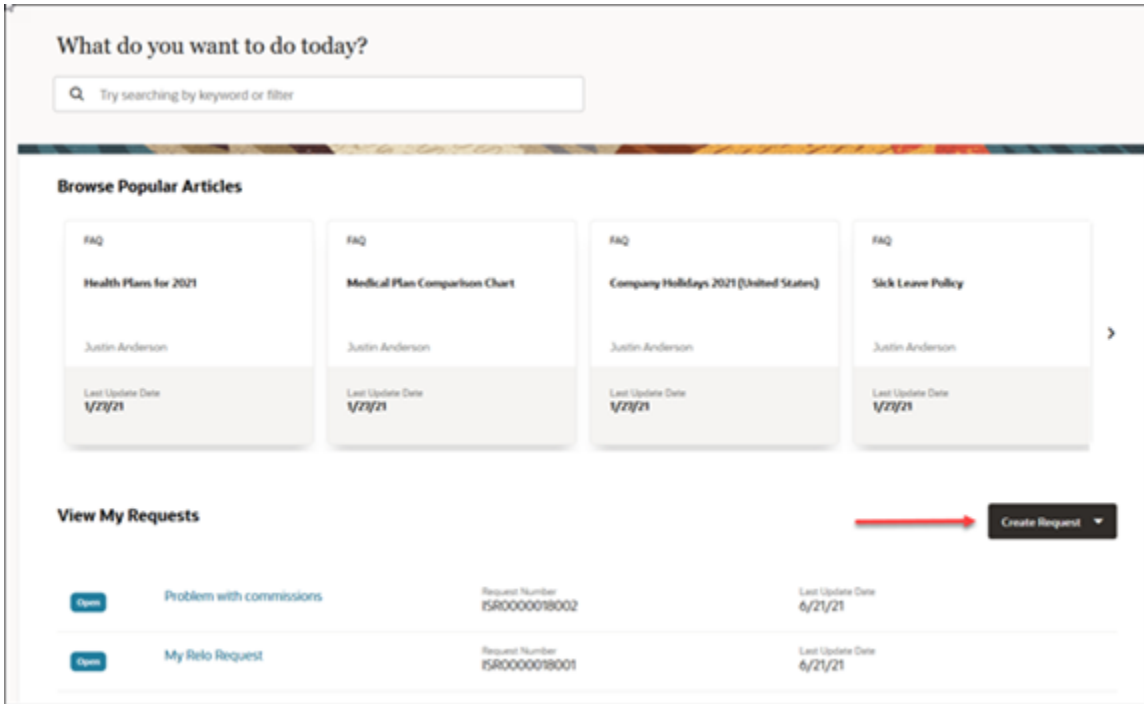


On the details page, you can:

- Click **Back** to return to your search results on the My Help page.
- Click the edit icon to access the request in edit mode.
- Send a message to the agent that's assigned to the request.
  - Enter your message in the **Subject** field and click **Send**.
- Close the request by clicking on the command bar and selecting **Close Help Desk Request**.
- Copy the Help Desk request by clicking on the command bar and selecting **Copy Help Desk Request**.

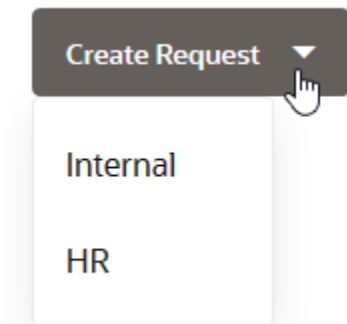
## Create Help Desk Request

If you want to create a help desk request, start at the My Help page.



To create the request, click the Create Request button.

**Note:** If your organization is using both internal requests and HR requests, the button will show as a drop down in which case you select the appropriate type of request. The following figure shows the drop down.



The screenshot shows the 'New Help Desk Request' form. At the top right, there are 'Cancel' and 'Save' buttons. The form contains the following fields and content:

- Subject:** A text input field containing 'Where is my expense reimbursement?'.
- Severity:** A dropdown menu with 'Low' selected.
- Category:** A dropdown menu with 'Expense Reports' selected.
- Product Group:** An empty text input field.
- Primary Point of Contact:** A dropdown menu with 'Cyndi House' selected.
- Installed Base Asset:** A dropdown menu.
- Detailed Description:** A large text area containing the text: 'My manager approved my expense report two weeks ago, but I haven't received a deposit in my bank account.'
- Drag and Drop:** A dashed border area with the text 'Select or drop files here.' and a plus sign icon.
- URL:** A text input field with an 'Add URL' button to its right.
- Footer:** A box containing the text 'No items to display.'

Enter the necessary information on the New Help Desk Request page and click **Save**.

Once you've saved the request, it shows up on the My Help page at the top of list of your requests.

The following table shows you how each field is used.

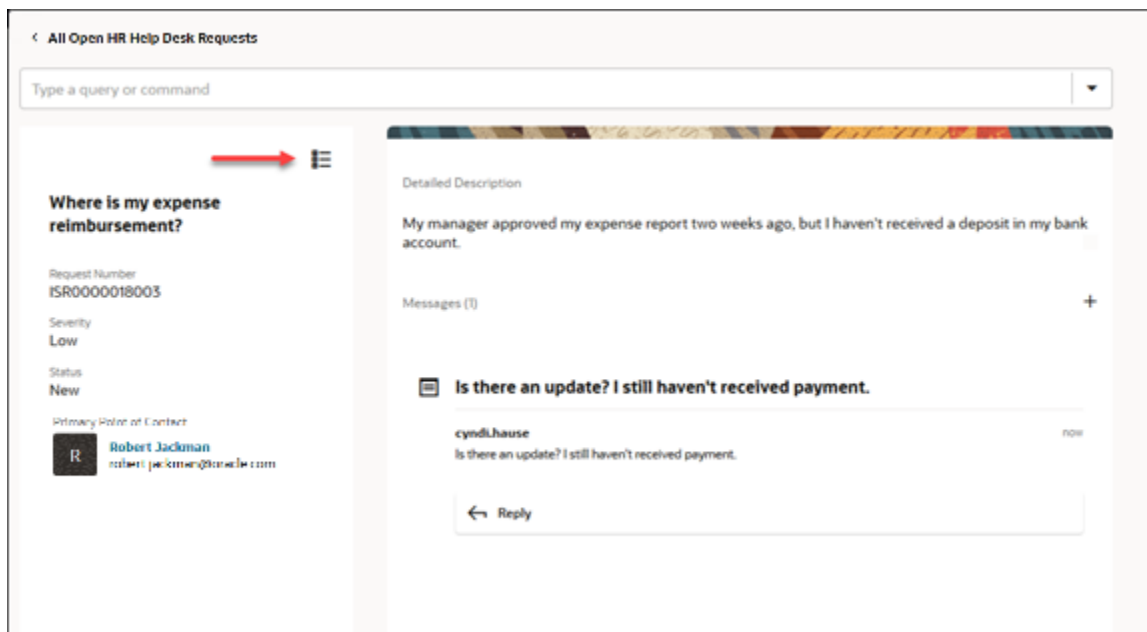
Field	Details
Subject	Enter a clear and concise subject for your request. This field is required.
Severity	Choose the severity level of the request. These are usually Low, Medium, or High. The default is set by your administrator, but you can change it.
Category	If you created this request from the Create Request button on a Knowledge Article, this will already be populated with the same category that was on that article.  Otherwise, choose a category that related to your request. In this example, the request is about an expense reimbursement, so we've chosen the Expense Reports category.
Product Group	Choose a product group for your request. This is another attribute used to determine the type of request.
Primary Point of Contact	This defaults to the person that entered the request.  You can change this by entering a different name.
Installed Base Asset	If your company is using Service Logistics Maintenance, you can choose which asset this request relates to.

Field	Details
Detailed Description	Enter the details about your request.
Drag and Drop and URL	You can attach relevant files to the request using drag and drop, add files (using the plus icon), or add a URL.

## View and Update a Help Desk Request

Here's how you view and update a help desk request.

From My Help, click on the name of the help desk request that you want to view or edit.

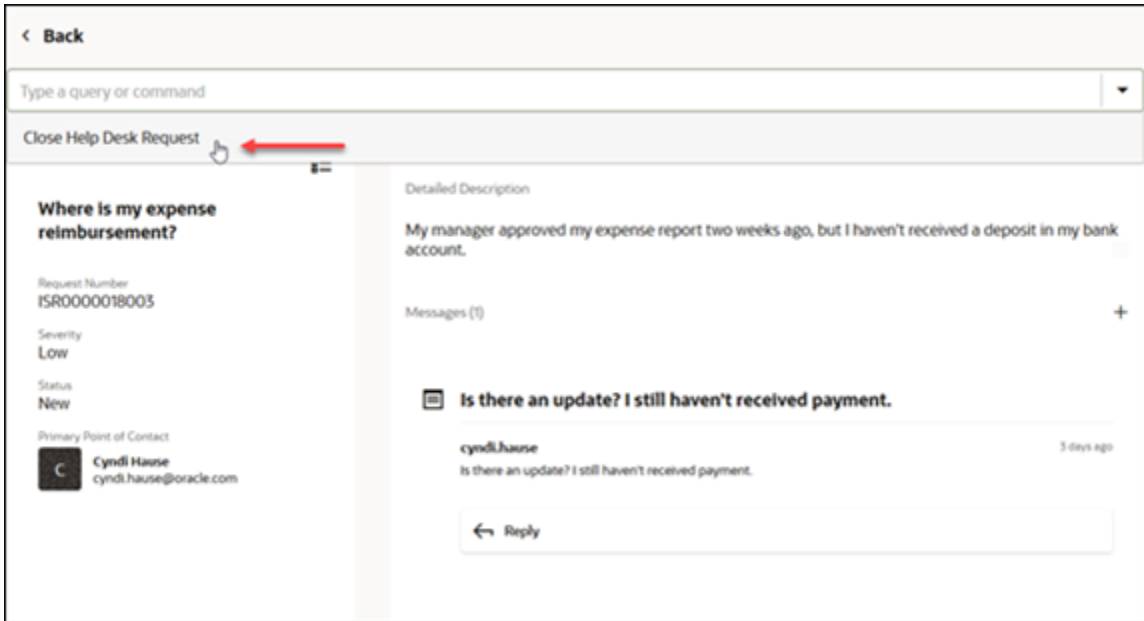


Here, you view the request, or add and read messages between you and the agent that's assigned to the request.

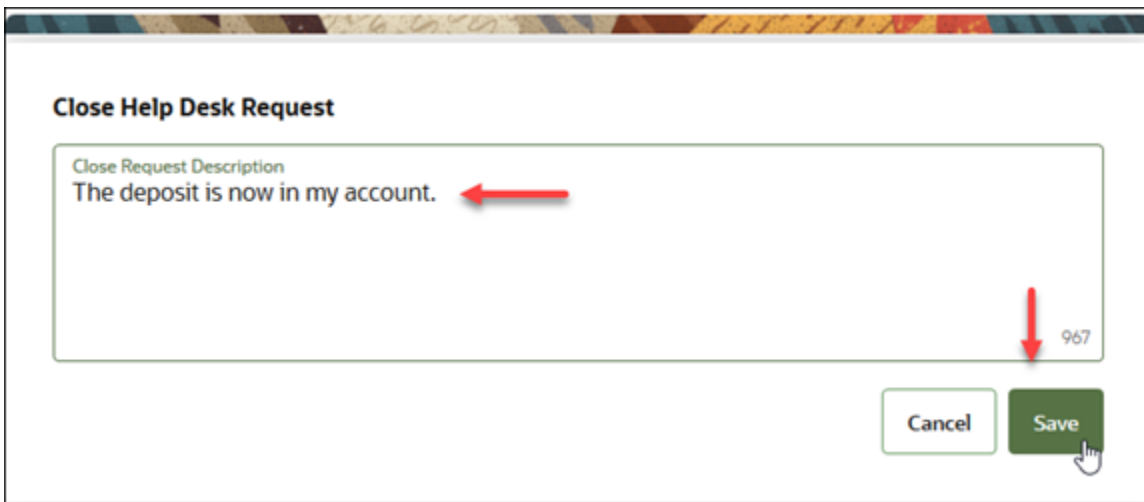
Click the bullet list icon to edit more details, add and read messages a message, or add attachments.

## Close the Request

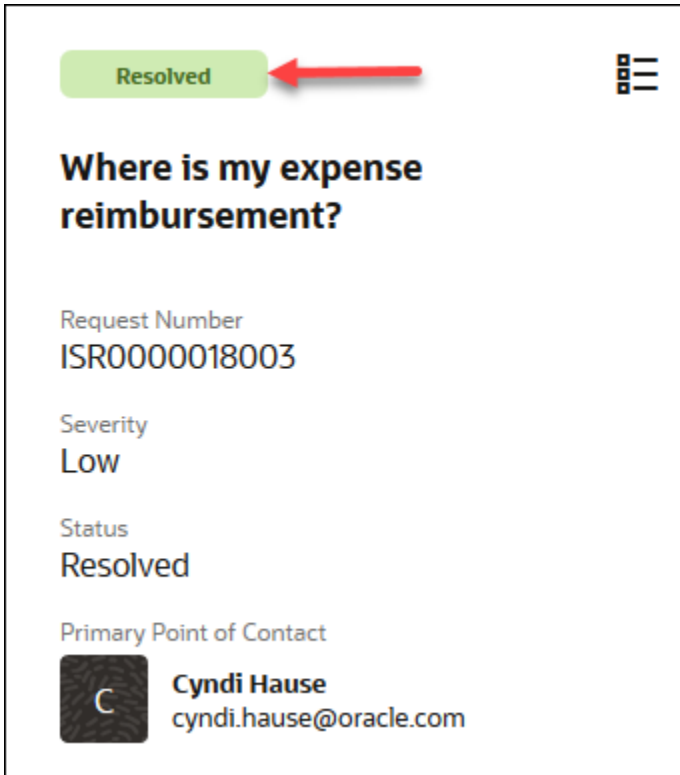
You can close the request by selecting Close Help Desk Request from the drop down list in the Assistant.



Enter a **Close Request Description** and click **Save**.

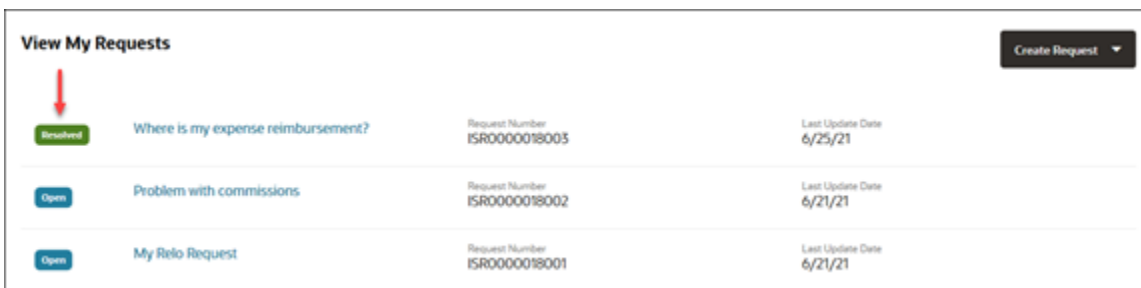


You now see the request is in a resolved status in the summary region.



A screenshot of a help desk request card. At the top left, there is a green pill-shaped button labeled "Resolved" with a red arrow pointing to it from the right. To the right of the button is a hamburger menu icon. Below the button, the title of the request is "Where is my expense reimbursement?". Underneath the title, the following details are listed: "Request Number" with the value "ISR0000018003", "Severity" with the value "Low", and "Status" with the value "Resolved". At the bottom, it shows the "Primary Point of Contact" as "Cyndi Hause" with the email address "cyndi.hause@oracle.com" and a small profile picture icon.

When you go Back to the My Help page, you also see the request in the resolved status in the **View My Requests** list.



A screenshot of the "View My Requests" page. At the top left is the title "View My Requests" and at the top right is a "Create Request" button with a dropdown arrow. Below the title is a list of three requests. The first request, "Where is my expense reimbursement?", has a green "Resolved" status button and a red arrow pointing to it. The second request, "Problem with commissions", has a blue "Open" status button. The third request, "My Relo Request", also has a blue "Open" status button. Each request row includes the request title, the request number, and the last update date.

Status	Request Title	Request Number	Last Update Date
Resolved	Where is my expense reimbursement?	ISR0000018003	6/25/21
Open	Problem with commissions	ISR0000018002	6/21/21
Open	My Relo Request	ISR0000018001	6/21/21

## Copy a Request

You can copy an existing help desk request to quickly create a new help desk request, when most of the information is the same. Here's how you do it:

1. Open the help desk request Overview page for the help desk request you want to copy.
2. In the **Action Bar**, enter **Copy**.

You can also enter synonyms such as **Clone** or **Duplicate**.

3. Select **Copy Help Desk Request** from the list of suggested actions.

The Copy Help Desk Request page is displayed in a new browser tab. The data from the Help Desk Request you're copying, is pre-populated.

**Copy Help Desk Request** Cancel Copy

Subject Required Primary Point of Contact: automhrhdadm1 svc Queue Default

Severity: Low Assigned To Category

Product Group Channel Type: Web Critical

Detailed Description  
Type # to bring up a list of SmartText.  
1000 Characters remaining

Copy All Contacts

Primary	Name	Job Title	Phone	Email
*	automhrhdadm1 svc			sendmail-test-discard@oracle.com

4. In the **Title** field, enter a title for the help desk request you're creating.

This is the only required field on this page.

5. Modify the values in other fields as appropriate.

For more information, see the "Create a help desk request" topic.

6. From the **Assigned To** drop-down list, select the employee you want to assign this request.
7. To copy all of the contacts associated with the help desk request you're copying, select the **Copy All Contacts** check box.
8. To copy all of the contacts associated with the help desk request you're copying, select the **Copy All Contacts** check box.
9. Click **Copy**.

The Help Desk Request Details page is displayed with the new request you created.

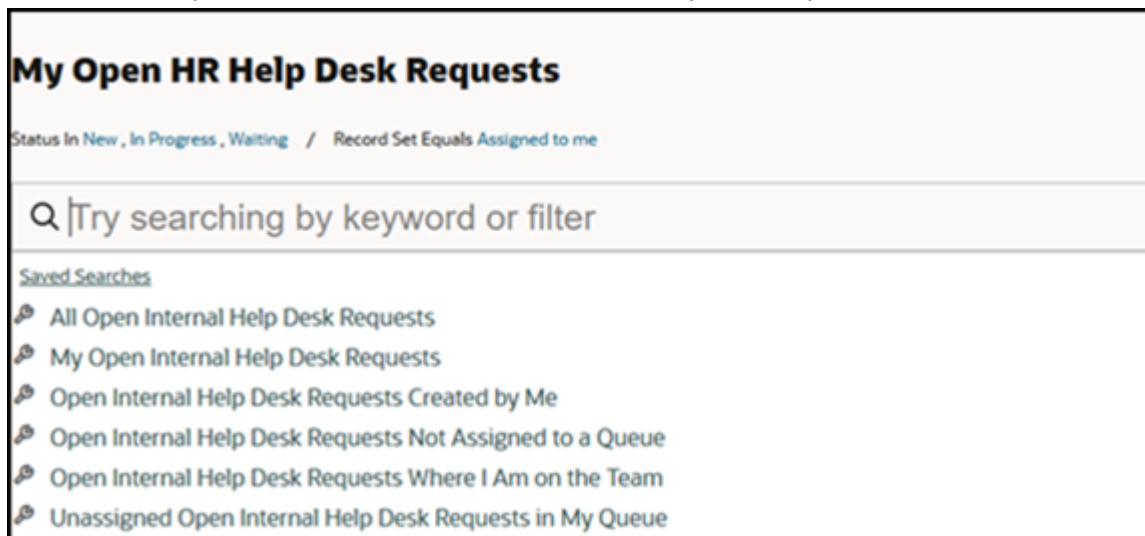
# 4 Help Desk Requests for Agents

## Saved Searches

### Switch to a Different Saved Search

When you navigate to a list page, the application displays the records associated with your default saved search. Here's how you can switch to another saved search:

1. Click in the Search bar.
  2. Select the new search from the list of saved searches.
- Here's an example of the saved searches available for help desk requests.



### How do I create a saved search?

All users can create their own personal saved searches. Service administrators can also share these saved searches with the rest of the organization or with certain roles.

Here's how you create a saved search:

1. Navigate to a list page and select a saved search as your starting point. Remember that existing saved searches might already include filters.
2. In the Search bar, add your filters. See the topic "Filter Your List" for details.
3. Add or change the columns displayed in the search results and the default search order by clicking the Actions icon.
4. Click **Actions > Save**.
5. Enter a name for your saved search in the **Save** dialog box. Saved searches are listed in alphabetic order.
6. Click **Save**.

Your new saved search is now listed in the Manage Saved Searches page.

## How do I manage Saved Searches?

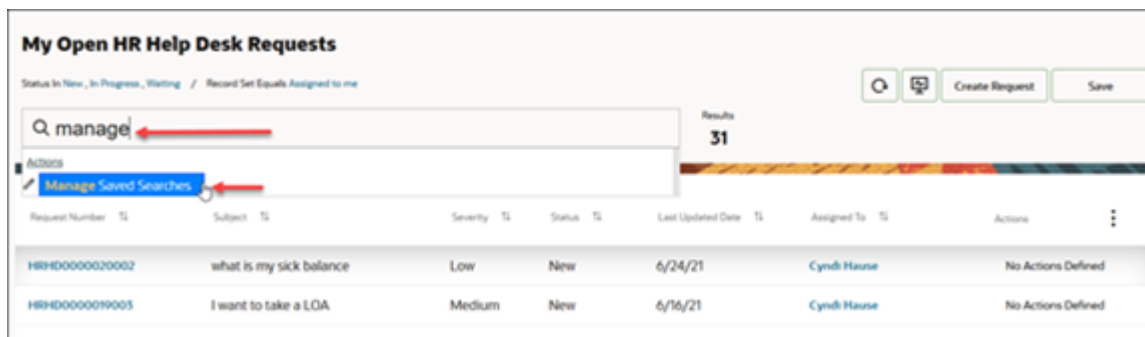
Here's how you can manage the saved searches you created including making your saved search the default search.

### Note:

- You can't edit or delete the saved searches provided by Oracle or your administrator.
- The results of all saved searches are displayed as a list.
- The star icon indicates the default saved search which can be changed to another saved search using **Actions**.

### 1. Click in the Search bar and select **Manage Saved Searches**.

If Manage Saved Searches isn't in your list, you can start typing in the command "Manage" and it will appear for you to select.



The Manage Saved Searches page is displayed. The lists are displayed in alphabetic order.

2. (Administrators only) Use the **Visible To** drop-down list to filter the list of saved searches displayed on the page.
3. Click **Actions** > **Edit** to change any of the saved searches you created. You can:
  - Rename the saved search.
  - Choose to share this saved search with only yourself, everyone, and (if you've the required permissions) you can share it with specific roles.
4. Click the drop-down list and select **Delete** to delete any of the saved searches you created.
5. Click **Save** after your changes are done.
6. Click **Actions** > **Set as Default** to set the saved search as the default saved search.
7. Click **Actions** > **Hide from List** to hide the saved search from being displayed on the list page.

To bring it back, go to the **Manage Saved Searches** page, click **Actions** > **Show in List**.

8. Click **Actions > Delete** to delete any of the saved searches you created.
9. Click **Done**.

## Lists

### Search Using Keywords

You can use one or more keywords to search in the Search bar.

Your search matches not only on the title, but also related information such as the contact name or request number. So, your search for Bill, it returns all that include Bill in the title, or name of the primary contact.

For example, selecting the All Open HR Help Desk Requests saved search, lets you search all open requests you can view. Selecting My Open HR Help Desk Requests lets you search all the open requests where you're assigned to the request.

### Select the Correct Saved Search as Your Starting Point

The saved search you select as your starting point determines the scope of your keyword search. For example, selecting the saved search, lets you search all open you can view. Selecting lets you search all the open where you're assigned to the .

### Search Complete Words

1. Finish typing a complete word.
  - o If you're searching for an item with multiple words in the name, you can enter any of the words. ,  
For example, to search for benefits enrollment period, you can enter benefits, enrollment, or period in the Search bar.
  - o Capitalization is ignored.
2. Press **Enter**.  
The application displays a list of records that contain your search term.

### Search Partial Words, Exact Phrases, and Use Operators

You can search on partial words, exact phrases, and use operators between words. Here's how:

- Use the star (\*) symbol to indicate missing characters or partial words. You can use the symbol at the beginning, end, or middle of the search term. For example, in the search bar, enter \*12345 to search for a SR with those numbers in it, for example SR0000012345.  
For example, entering \*tion as your search term to find all items ending with the letters tion. Entering the star symbol in the middle of a word such as pi\*le, returns Pinnacle, Pineapple, and so on.
- Use the question mark (?) to match exactly one character. You can use this wildcard at the beginning, end, or middle of a word.  
For example, entering pri?e returns Price, Prize, Pride, and so on.

- Put multiple search terms in quotes to search for exact phrases.

For example, entering `hourly pay` returns only hourly pay and any other records with those two terms in that specific order.

- Use the OR operator to search on multiple terms.

For example, to search for benefits enrollment period, you can enter benefits, enrollment, or period in the Search bar.

- Use the NOT operator to narrow down your search.

For example, Benefits NOT Enrollment, when searching for requests, returns all requests with Benefits in the title, but not Benefit Enrollment.

When you use NOT followed by two or more words you must enclose the words in double quotes (" "). For example, entering Benefits NOT 'Enrollment Period' when searching for requests excluding Enrollment Period.

- Capitalization doesn't matter on search terms, but the operators OR and NOT must be in uppercase letters.

## Filter Your List

Use filters to narrow down your search. You can filter your list using information in the object you're searching for as well as information that's stored in related objects. You can add multiple filters. Here's how:

1. On the Help Desk Request List page, click in the Search bar.

2. To filter the list based on numeric values such as the help desk request number, employee number or asset number::
  - a. Enter **Number** in the Search bar.  
A list of numeric fields is displayed.
  - b. Select the appropriate field to filter.
  - c. Select the operator.  
You can select the common operators such as **Equals** or **Contains**. You can also click **Show More** to display all operators.
  - d. Enter or select the values, and press **Enter**.

Here's an example that shows how you can filter the list by the help desk request number:

**All Open HR Help Desk Requests**  
Status Equals New, In Progress, Waiting / Record Set in All records I can see

Q number

- Request Number
- Assigned To: Primary Phone: Phone Number
- Contact: Primary Phone: Phone Number
- Team Members: Primary Phone: Phone Number
- Messages: Posted By: Primary Phone: Phone Number
- Q Search "number"

**All Open HR Help Desk Requests**  
Status Equals New, In Progress, Waiting / Record Set in All records I can see

Q Request Number

- Equals
- Contains
- Show More

**All Open HR Help Desk Requests**  
Status Equals New, In Progress, Waiting / Record Set in All records I can see

Q Request Number Equals

Hrhd0000000001	1
Hrhd0000000002	1
Hrhd0000000003	1
Hrhd0000000004	1
Hrhd0000000005	1
Hrhd0000001001	1
Hrhd0000001005	1
Hrhd0000002002	1
Hrhd0000002003	1
Hrhd0000002005	1

3. To filter the list based on text fields such as primary point of contact :
  - a. Enter the name of the field in the Search bar.  
A list of filters is displayed.
  - b. Select the appropriate field to filter.
  - c. Select the operator.  
You can select the common operators such as **Equals** or **Contains**. You can also click **Show More** to display all operators.
  - d. Enter or select the values, and press **Enter**.
4. To filter the list based on ranges of numeric and date fields:
  - a. Click in the Search bar.
  - b. Search for the numeric field or date field and select it from the list.
  - c. Select the numeric range or operator from the list, and the operator value.  
You can select the predefined ranges. You can also select the Between operator and specify your own range.
  - d. Press **Enter**.
5. To remove a filter, place your cursor over it and click the x icon (highlighted in the following image).



## Modify the Display of Fields in the List

You can change what fields display in the list of results, in what order they appear, and how the results are sorted.

Here's what you can do:

- Sort the list by one of the columns:
  - a. To sort the list by one of the columns, click the **Sort Ascending** or **Sort Descending** arrows next to the column name header.
  - b. To restore the default sort order, click the **Actions** drop-down list, and select **Sort by Relevance**.
- Add or remove the columns displayed in the list:
  - a. Click the **Actions** and select **Manage Columns**.
  - b. In the **Manage Columns** dialog box, select the fields you want to display and deselect the fields to hide. You can search or scroll through the list.
- Change the order of columns displayed in the list:
  - a. Click the column header for the column you want to rearrange.  
The selected column is highlighted.

- b. Drag the column to the new place.
- Adjust the width of the columns:
  - a. Click on the column you want to resize.
  - b. Hover over the side of the column and drag the column width (from either edges).

## Group Your Search Results

On the Help Desk Request List page, you can group your search results by different attributes and display key information about each grouping. Different objects permit different groupings.

Grouping your search results lets you summarize key information, so that your list displays the totals for all the search results and subtotals for each of the groupings. For example, you can group your help desk requests by severity, which shows you how many help desk requests are of low, medium, and high severity.

Here's how you group your search results on the list page:

1. Select an attribute from the **Group By** drop-down list.  
Your results are automatically grouped on the page in collapsible sections with the count of records in each.
2. Click the **Actions** drop-down list, then choose **Manage Group By**.  
The **Manage Group By** window is displayed.
3. From the **Group Sort Order** drop-down list, select a sort option.
4. Click **Apply**.

## Export Your Search Results

From the Help Desk Request List page, you can export up to 2,000 search results as either a Microsoft Excel or a .csv file. The exported file includes all of the columns displayed in your search results.

1. Ensure that the **Group By** field is set to **None**. You can't export grouped results.
2. Click the **Actions** drop-down list, and select **Export** and select the file format, either **Export to Excel** or **Export to CSV**.

The file downloads to your computer.

## Navigate from One Record to the Next as You Work a List

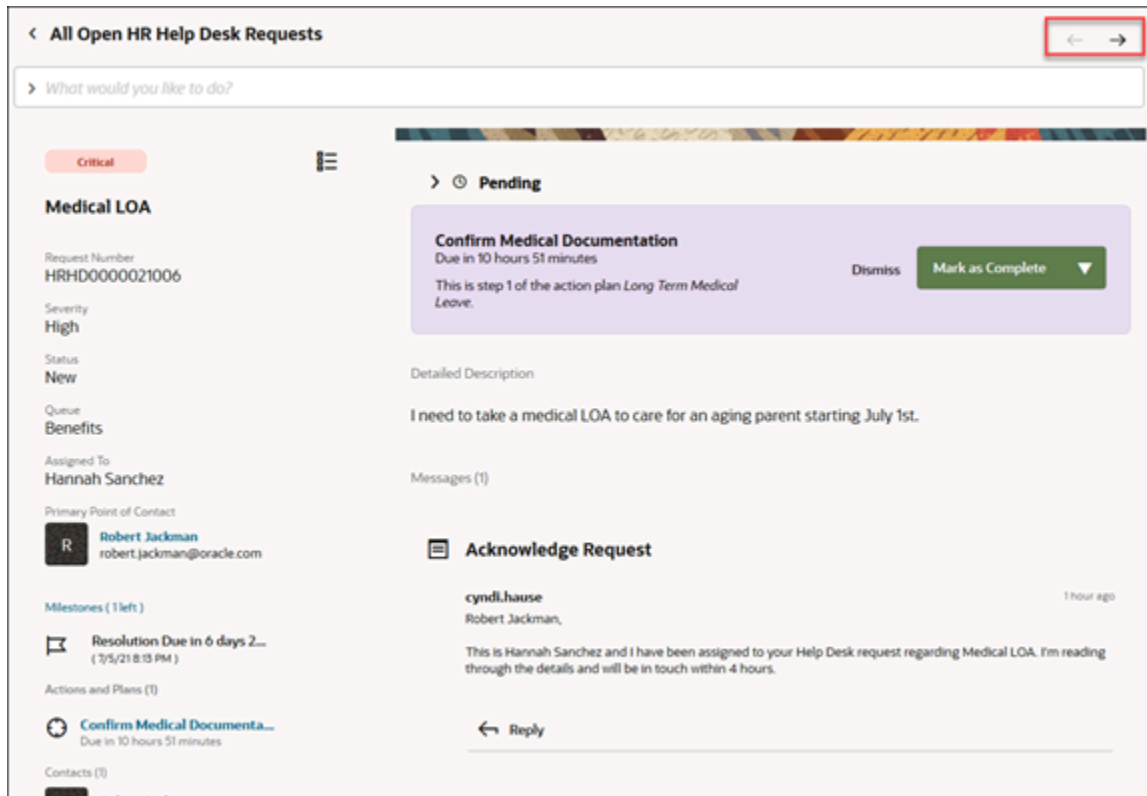
When you have drilled into a record and completed your work there, you can work through the list of records in chronological order. Use the navigation links to go to the next record in the list, or return to your list page.

First, specify your filters and sort order in a list. Next, drill into a record, and when you're done reviewing the record, navigate to the next record in sequence (of your list). Return to your most recently viewed list page whenever you're done reviewing the records.

**Note:** To work all of the items in the list, drill into the first record of the list, and then use the arrows to go to the next record, or return to your list.

Here's an example of a Help Desk Request Details page. Click the forward arrow to go to the next record in the list. Click the back arrow to go back to the saved search.

Click the name of the list (highlighted in the screenshot) to return to the most recently viewed list page.



## Help Desk Request List Page

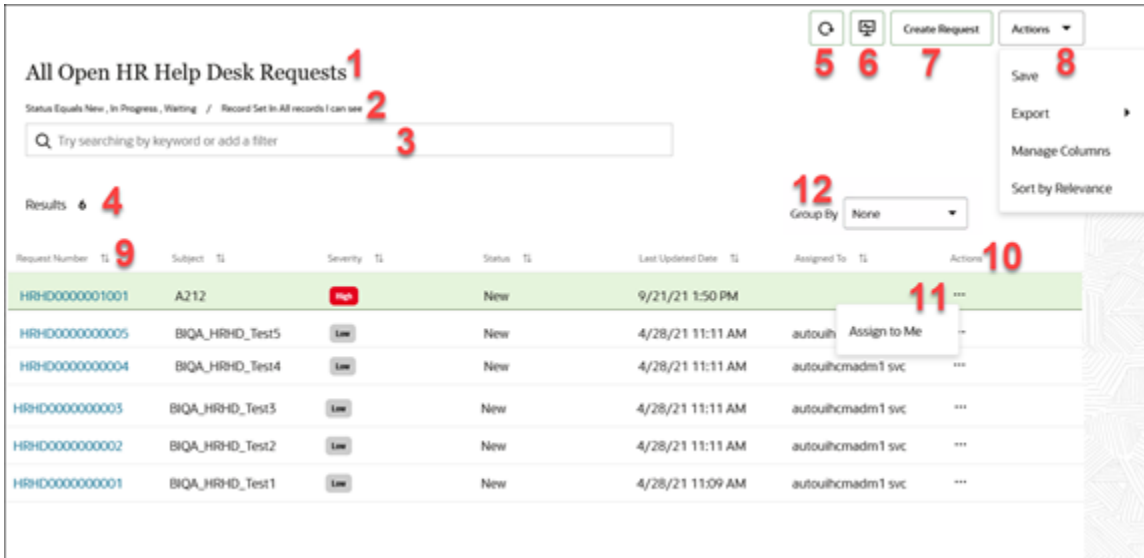
### Overview of the List Page

On the Home page, if you click **the Help Desk** and then **Help Desk Requests** navigation icon, the Help Desk Request List page displays. The **My Open Help Desk Requests** list is displayed by default.

You can select another saved search or create saved searches of your own, to view the corresponding results in the list.

**Note:** For more information on how to work with filters, saved searches, and the columns displayed on the list page, see the "Saved Searches" and "Lists" topics.

Here's an overview of the different sections of the list page, and what you can do.



Callout No	What is it?	What You Can Do
1	The name of the saved search that's displaying the list you're seeing on the page.	Select a different saved search by clicking in the Search bar.
2	List of filters that apply to the saved search. The record set filter specifies the set of records you can search. The list of filter criteria builds as you add filters and search terms. If there are no filters, you're seeing a list of all of the records that you have permission to view.	<ul style="list-style-type: none"> <li>Remove the filter criteria by hovering over it and clicking the x icon.</li> <li>Add filter criteria from the Search bar.</li> </ul>
3	Search bar. It lists the available saved searches and actions. To see the list, click in the Search bar.	<ul style="list-style-type: none"> <li>Search the list by keywords.</li> <li>Enter filters to narrow down the search.</li> <li>Select a saved search.</li> <li>Manage your saved searches.</li> </ul>
Results	Results. Number of records in the list.	See how many records are displayed under the selected saved search.
5	Refresh	Refreshes the Help Desk request list.
6	Dashboard	Opens Analytics infolets in a separate tab.
7	Create Request	Creates a new Help Desk request.
8	Actions	<ul style="list-style-type: none"> <li>Save your search criteria and filters as a new saved search</li> <li>Export Help Desk Request list to CSV/XLS.</li> <li>Add or hide columns.</li> </ul>

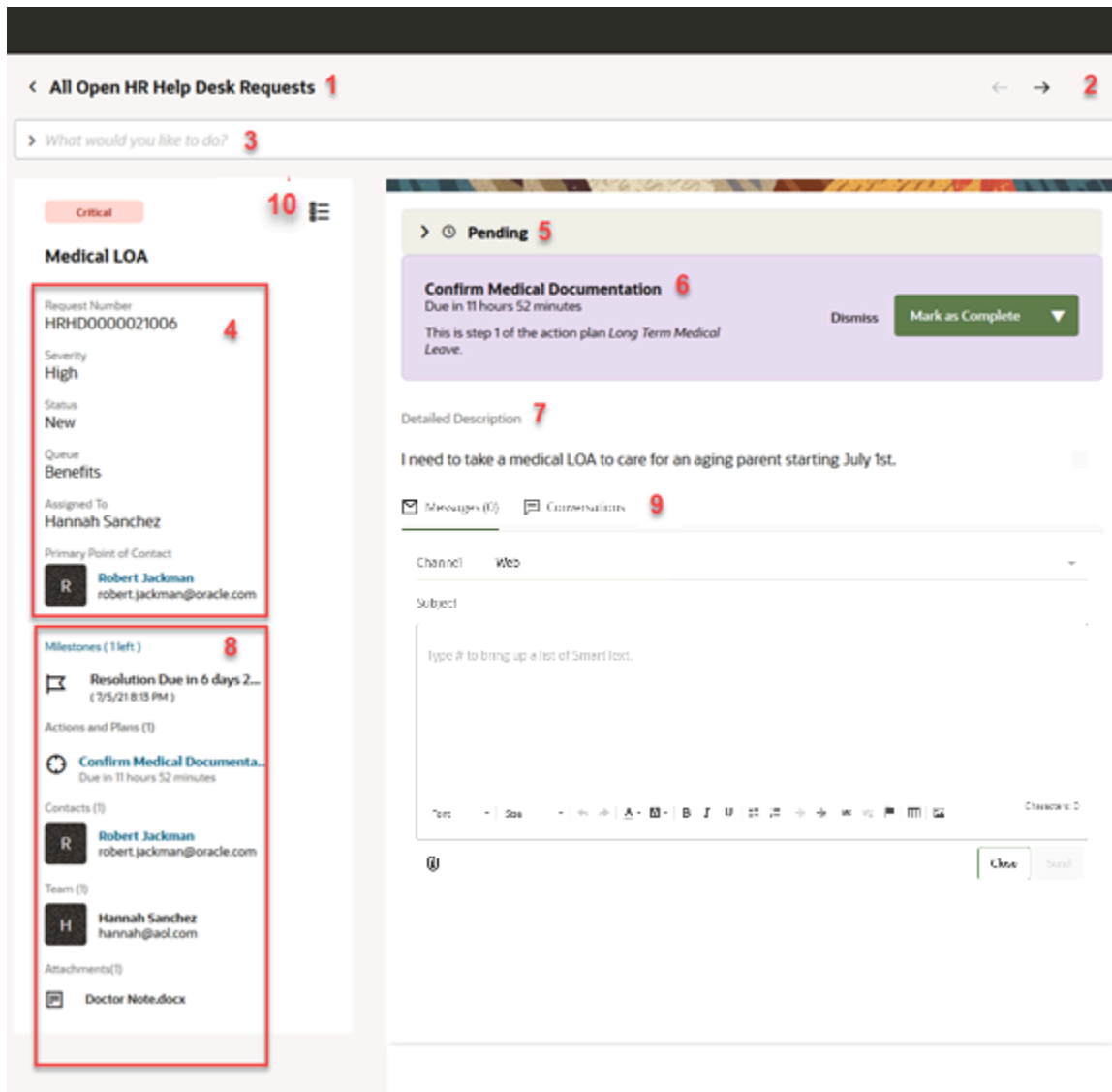
Callout No	What is it?	What You Can Do
		<ul style="list-style-type: none"> <li>Sort by relevance.</li> </ul>
9	Request Number	Click the link to drill into the help desk request details. The Help Desk Request Details page opens in a new browser tab.
10	Actions on the list to specify what fields display and how they appear in the list	<ul style="list-style-type: none"> <li>Manage Columns by selecting what columns are displayed.</li> <li>Sort by relevance.</li> </ul> <p><b>Note:</b> You can change the order of the columns by dragging the columns in place or adjust the width.</p>
11	Actions you can take on a record directly from the list.	Click <b>Assign to Me</b> to take ownership of the request.
12	Group By	Group requests by attributes listed under the Group By. The results are displayed in a summarized group that you can expand.

## Help Desk Request Details Page

### Overview of the Details Page

On the Help Desk Request List page, if you click a request Request Number, the Help Desk Request Details page is displayed. This page displays detailed information about the help desk request.

The following table shows an overview of the different sections of an individual help desk request record and what you can do.



Callout No	What It Is	What You Can Do
1.	Name of the list	Click to navigate back to the previously viewed Help Desk request list page.
2.	Next and Back Arrows < or >	Click the next arrow to go to the next record in the help desk request list you viewed most recently.  Or, click the back arrow to go to the previous record.  If you have drilled into a service request from the service request list page, this link takes you to the next service request that was on the original service request list that you came from.

Callout No	What It Is	What You Can Do
3.	Assistant	Enter keywords such as Add, Update, Search, Filter, and Compose, and select your intended action. You can add information, update individual fields, take actions, filter the information you see in the Activity stream, and search. To make suggestions, the Assistant looks for key verbs and names of objects and fields.
4.	Summary region  Summary of key fields in the record. Only fields with values get displayed.	Click a field link to drill into its details. For example, if you click the Primary Contact link, a window opens for the agent to link to information and HCM actions (HR Help Desk).
5.	Pending region.  Displays the open items such as actions, plans, and knowledge articles that you need to complete or review for the service request. When you complete an item, it moves to the Activity stream.	<ul style="list-style-type: none"> <li>• Update the action or plan.</li> <li>• View the entire knowledge article by clicking on the title of the article.</li> <li>• Link the recommended knowledge article to the selected service request.</li> </ul>
6.	Recommendation region.  Displays the next recommended step, highlighted in solid color. This could be: <ul style="list-style-type: none"> <li>• Actions that are due immediately. Actions always show up first, especially if they're due in the next 24 hours.</li> <li>• Published knowledge articles that can help resolve the selected service request.</li> </ul>	<ul style="list-style-type: none"> <li>• Update the action.</li> <li>• View the entire knowledge article by clicking on the title of the article.</li> <li>• Link the recommended knowledge article to the selected service request.</li> </ul>
7.	Pinned region.  Persists the problem description so that you can see it while you review the service request.	Review the problem description.
8.	Related information  Summarizes and provides links to different items related to the help desk request, such as contacts, milestones, attachments, team members, and actions and plans. The summaries also show the number of records in each item. For contacts and team, the name of the first or primary record is shown. Only items with values get displayed.	<ul style="list-style-type: none"> <li>• Click a related item link to drill into its details.</li> <li>• View and edit the related fields, which are filtered in the corresponding item panel. For example, click the Milestones link to view and edit the milestone details.</li> </ul>
9.	Messages and Conversations	Shows flow of messages on the request. Here you can reply in-line to existing messages.  Click the conversations tab to start a conversation with someone not on the request team.

Callout No	What It Is	What You Can Do
10.	Help Desk request full details	Click to view the Help Desk Request Details page. Here, you can edit multiple fields at once, for the selected request.

If a Maintenance Help Desk is enabled and the request includes a work order associated to an installed base asset, the summary region includes the **Asset Number** and **Maintenance Work Orders** as shown in the following image.

Request Number  
**ISR0000011004**

Severity  
**Low**

Status  
**In Progress**

Queue  
**Default**

Assigned To  
**Andy Ransome**

Primary Point of Contact  
 **Andy Ransome**  
almqa@oracle.com

Installed Base Asset Number  
**REF\_MED\_100**  
**REFRIGERATION UNIT IN BUILDING 100**

Milestones ( 1 left )

 **Resolution Metric Due 3 mo...**  
( 4/19/21 1:10 PM )

Maintenance Work Orders  
**wo1009 - ORA\_UNRELEASED**

Contacts (1)  
 **Andy Ransome**  
almqa@oracle.com

# Create a Help Desk Request

## How to Create a Help Desk Request

Here's how you create a help desk request:

1. On the Help Desk Request List page, click **Create Request**.  
The **New Help Desk Request** page is displayed.
2. Enter a **Subject** for the request.  
This is the only required field on this page.
3. From the **Primary Point of Contact** drop-down list, select the primary contact associated with the request.
4. Select a **Queue** from the drop-down list or leave blank for auto-assignment.
5. Select a **Severity** level.
6. From the **Assigned To** drop-down list, select the person to assign this request to, or leave blank for auto-assignment..
7. Select the **Category** from the drop-down list.
8. Select the **Product Group** from the drop-down list.
9. Select the **Installed Base Asset** from the results list after typing in at least three characters.
10. Select the **Channel Type** from the drop-down list.
11. Turn on the **Critical** switch if the request is critical.
12. In the **Detailed Description** field, describe the issue.  
You can insert SmartText by typing the pound sign (#) to display a list of rich-text SmartText entries, and type-ahead to progressively search and filter this list.
13. If you have files to attach to the request, you can drag and drop them from a file, or click the **Add (+)** icon to search and select the file to upload.
14. You can also add a relevant URL to the request. Enter the URL and then click **Add URL**.
15. Click **Save**.  
The Help Desk Request Details page is displayed.

# Copy a Help Desk Request

## Copy a Help Desk Request

You can copy an existing help desk request to quickly create a new one, when most of the information is the same. Here's how you do it:

1. Open the Help Desk Request you want to copy.
2. In the **Assistant**, enter **Copy**.  
You can also enter synonyms such as **Clone** or **Duplicate**.
3. Select **Copy Help Desk Request** from the list of suggested actions.

The Copy Help Desk Request page is displayed in a new browser tab. The data from the service request you're copying, is pre-populated.

4. In the **Title** field, enter a title for the request you're creating.

This is the only required field on this page.

5. Modify the values in other fields as appropriate.

For more information, see the "Create a Help Desk Request" topic.

6. From the **Assign To** drop-down list, select the agent you want to assign this request.
7. To copy all of the contacts associated with the request that you're copying, select the **Copy All Contacts** check box.
8. To copy all of the team members associated with the request that you're copying, select the **Copy All Team Members** check box.
9. Click **Copy**.

The Help Desk Request Overview page is displayed with the new request you created.

## Edit a Help Desk Request Using the Details Page

### Add Information

To edit individual fields related to the selected service request record, use the actions in the Action Bar on the Help Desk Request Details page.

Place your cursor in the Action Bar and select one of the most frequently used actions (common suggestions). Or, start typing an action or search word, and the Action Bar displays suggestions that you can select from a list. To make suggestions, the Action Bar looks for key verbs and names of objects and fields.

In the **Action Bar**, enter **add** to view a list of related items you can add. Here's a list of the related items you can add to a help desk request:

Action	Description
Add Action	Add individual action plan actions to the service request.
Add Action Plan	Add action plans to the service request.
Add Attachment	Add attachments to the service request.
Add Contact	Add one or more contacts to the service request.
Add Team Member	Add team members who can view and work on the request.
Add Asset	Add asset to the request.
Add Work Order	If enabled, add work order to the asset on the request.

## How do I compose messages?

In the **Action Bar**, enter **compose** to view a list of message types that you can use to send messages to customers or team members. Here's how you compose the various message types for a help desk request:

Action	Description
Compose Email	Creates a response message type. <ul style="list-style-type: none"> <li>A new conversation thread is started.</li> <li>The Channel Type defaults to Email.</li> <li>You can insert Smart Text by typing # to display a list of rich-text Smart Text entries, and type-ahead to progressively search and filter this list.</li> <li>You can add attachments which are displayed inline.</li> </ul>
Compose Internal Note	Creates an internal note message type. Use internal notes to communicate with your other team members who have access to your requests. <ul style="list-style-type: none"> <li>You can insert SmartText by typing # to display a list of rich-text SmartText entries, and type-ahead to progressively search and filter this list.</li> <li>You can add attachments, which are displayed inline.</li> </ul>
Compose Web Message	Creates a response message type.

Action	Description
	<ul style="list-style-type: none"> <li>A new conversation thread is started.</li> <li>The Channel Type defaults to Web.</li> <li>You can insert SmartText by typing # to display a list of rich-text SmartText entries, and type-ahead to progressively search and filter this list.</li> <li>You can add attachments, which are displayed inline.</li> </ul>
Capture Customer Message	Capture what the employee has reported to you about the help desk request. You should use this action only if you aren't using the typical ready-to-use channels such as email integration.
Compose Message	<p>Creates a new response message type.</p> <ul style="list-style-type: none"> <li>A new conversation thread is started.</li> <li>You must select the Channel and Channel Type.</li> <li>The <b>To</b> is defaulted as the primary point of contact on the request, but you can click the field to show a drop-down list of contacts and team members associated with this SR, search for any user, or manually enter any email.</li> <li>You can also click the link to add a CC or BC.</li> <li>You can insert SmartText by typing # to display a list of rich-text SmartText entries, and type-ahead to progressively search and filter this list.</li> <li>You can add attachments, which are displayed inline.</li> </ul>
Start Internal Conversation	<p>Starts a new conversation thread with the team or other resources within your organization.</p> <ul style="list-style-type: none"> <li>You must select the Channel and Channel Type.</li> <li>You can add attachments, which are displayed inline.</li> </ul>

## Perform Other Actions

Here are other actions you can perform using the Action Bar.

Action	Description
Search Knowledge	Searches the knowledge database and displays the results in a new browser tab that includes the <b>Title</b> and <b>Reference Number</b> .
Resolve Help Desk Request	<p>Lets you resolve a help desk request.</p> <p><b>Note:</b> The Action Bar displays the <b>Resolve Service Request</b> action in the suggested actions even when you enter these synonyms for <b>resolve: close, complete</b>.</p>

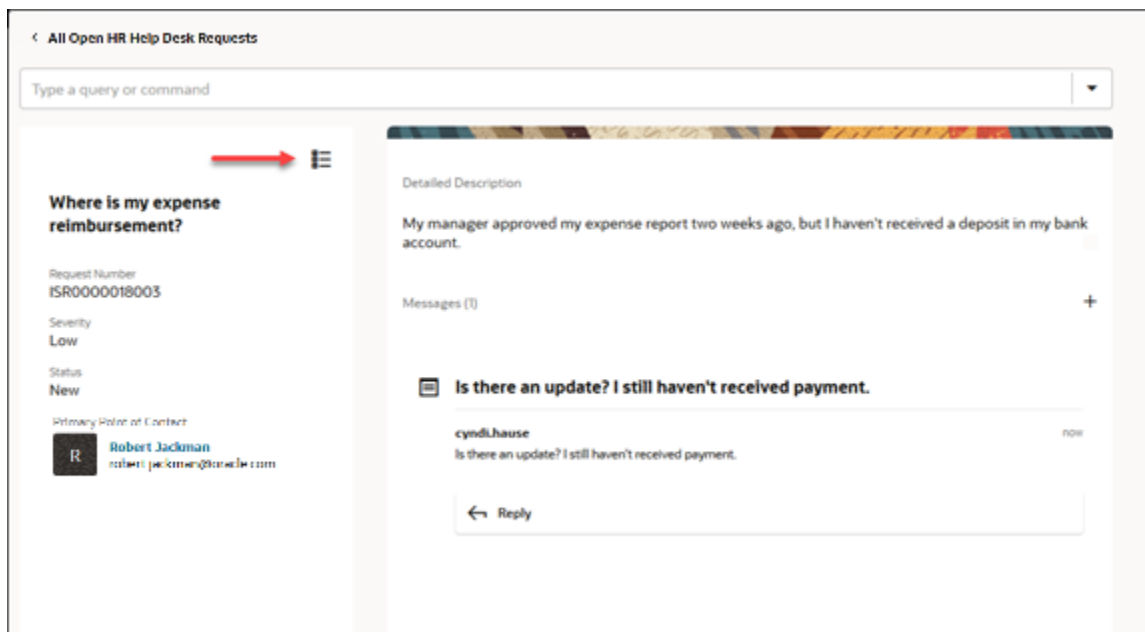
Action	Description
Copy Help Desk Request	<p>Lets you copy an existing help desk request to quickly create a new help desk request, when most of the information is the same.</p> <p><b>Note:</b> The Action Bar displays the <b>Copy Service Request</b> action in the suggested actions even when you enter these synonyms for <b>copy: clone, duplicate</b>.</p>
Transfer Help Desk Request	Lets you transfer Help Desk Requests to a member of the current queue, a specific person, or to another queue.

## Edit a Help Desk Request Using the Full Details Page

### Overview of the Help Desk Request Full Details Page

To edit multiple fields related to the selected help desk request record, use the Help Desk Request Full Details page.

Here's how you access the full details page. On the Help Desk Request Details page, click the icon highlighted as shown in the following screenshot:



Here's the Full Details page:

The screenshot shows the 'UNIT APPEARS TO BE LEAKING' help desk request details page. The page is divided into several sections:

- Summary:** Contains fields for Subject (UNIT APPEARS TO BE LEAKING), Severity (Low), Status (In Progress), Category, Product Group, Priority/Phase of Contact (Andy Ramon), Queue (Default), Assigned To (Andy Ramon), Channel Type (Web), and a checkbox for Email (checked). A description field contains the text 'NOT KEEPING COOLD'.
- IB Asset Information:** Shows the Asset ID (REF\_MED\_100) and Description (REFRIGERATION UNIT IN BUILDING 100).
- Maintenance Work Orders:** A table with columns for Work Order ID, Description, and Work Order Status. One entry is visible: w0009, INSPECTION CHECK SEAL, and ORA\_UNRELEASED.
- Attachments:** A 'Drag and Drop' area for files, with a URL field and an 'AMFURL' button. It currently shows 'No items to display'.
- Contacts:** A table with columns for Primary, Name, Job Title, Phone, and Email. One contact is listed: Andy Ramon, @mpg@oracle.com.
- Team:** A table with columns for Assigned To, Name, Email, and Phone. One team member is listed: Andy Ramon, @mpg@oracle.com.
- Milestones:** A table with columns for Metric, Status, and Due Date. Two milestones are shown: 'First Response Metric' (Complete, 4/10/21 10:04 AM) and 'Resolution Metric' (In Progress, Due 4/10/21 10:04 AM).

## Update Summary Information

The **Summary** section lets you update basic details about the help desk request.

1. In the help desk request, click into any field and begin editing..
2. Modify any of these fields following the steps specified in the "Create a Help Desk Request" topic:
  - o Subject
  - o Status
  - o Severity

- Category
  - Product Group
  - Primary Point of Contact
  - Queue
  - Assigned To
  - Channel Type
  - Detailed Description
3. To include this help desk request in the critical help desk request reporting metric, select the **Critical** check box. It doesn't affect the service request resolution.
  4. Click **Save**.

## Update Solution Details

The Solution Description section of the Summary section shows after completing the Resolve Service Request action in the Action Bar on the Help Desk Request Details page.

If required, the Outcome, Resolution, and Solution Description can be updated in this section.

1. Click in the **Solution Details** section and begin editing or adding information.
2. Update **Outcome**, **Resolution**, and **Solution Description**.

You can insert SmartText by typing # to display a list of plain SmartText entries, and type-ahead to progressively search and filter this list.

3. Click **Save**.

## Update Milestones

A milestone is a type of entitlement. Entitlements are benefits or privileges you provide to employees when you extend service to them.

A milestone identifies service levels your organization has committed to its employees, and is tracked when providing service in the context of a help desk request.

Here's the ready-to-use milestones you get with the application:

- **First Response Metric:** Tracks how quickly you agree to respond to after the request is received.
- **Resolution Metric:** Tracks how quickly you must resolve the request.

The Milestones section lets you update these milestones. Here's how:

1. In the **Milestones** list, click the vertical 3 dots icon, and click **Edit** for the milestone you want to update.
2. To modify the milestone due date, click in the **Due Date** field, select the date, and then click **Done**.
3. To acknowledge that you have completed the milestone and close it, click the **Agent Completed** slider.
4. Enter your comments in the **Comments** field.
5. Click **Save**.

## Update Contacts

Here you can add one or more contacts to the help desk request.

1. In the **Contacts** section, click **Add Contact**.
2. Select a contact from the drop-down list.
3. To make a contact the Primary Contact, click the vertical three dots in the Actions field and select **Make Primary**.
4. After adding a contact who isn't the primary contact, you can click vertical 3 dots in the Actions field and set access to Regular or None, depending on your need.
5. To delete a contact, click vertical 3 dots in the Actions field for the selected contact and select **Remove Contact**.

**Note:** You can change the primary contact, but you can't delete a primary contact.

## Update Attachments

Attach files and URLs and edit attachments to the help desk request.

1. In the **Attachments** section, drag the files to attach them, or click in the field to add files from your local computer.
2. To attach a URL, enter the URL name and click **Add URL**.
3. To download an attachment, click **Download** for the selected attachment.  
To edit an attachment, click the ellipsis button (...) and select **Edit**.
4. To delete an attachment, click the ellipsis button (...) and select **Remove** for the selected attachment.

## Update Team

Here you can add team members who can view and work on the help desk request.

1. In the **Team** section, click **Add Team Member**.
2. Select a team member from the drop-down list.
3. To delete a resource, click on the trash can icon for the selected resource.
4. To assign the help desk request to a team member, click the **Assign To** radio button.

**Note:** A request can be assigned to only one resource.

## Update Asset and Work Order

If a Maintenance Help Desk is enabled, you can link an asset to the help desk request and create a work order associated to the asset.

1. In the **IB Asset Information** section, enter three or more characters to search for an asset.
2. Select an asset from the search results.
3. In the **Maintenance Work Orders** section, click the **(+) add icon** to create a work order.
4. Complete the following fields as applicable:
  - o Work Order Type
  - o Work Order Sub Type
  - o Organization Code
  - o Maintenance Work Definition
  - o Start Date
  - o Priority
  - o Description
5. Click **Save**.

## Resolve a Help Desk Request

### Link or Share a Knowledge Article to a Help Desk Request

Knowledge Articles that can help resolve the selected request are displayed in the right hand panel of the Help Desk Request details page. You can link or share the recommended knowledge article to the selected request.

The application recommends published knowledge articles that closely match the values in the combination of the Title, Category, and Product fields of the help desk request. Here's how to link or share a knowledge article to a request:

1. You can take three actions on a recommended article:
  - o Click **Link** to link the knowledge article to the selected request.
  - o Click **Share** to share the knowledge article.

A message **Compose** panel is displayed.

    - i. Add subject text.
    - ii. (Optional) Add inline attachments and preview your email.
    - iii. Click **Send**.
  - o Click **Not Helpful** to dismiss the recommended knowledge article.
2. Click the title of the article to view the entire knowledge article in a separate browser tab.
3. Review the knowledge article and do any of the following:
  - o Click **Link to Help Desk Request** to link the knowledge article to the selected request.

**Note:** Click **Unlink from Help Desk Request** to unlink the knowledge article from the selected request.
  - o Click **Share in Help Desk Request** to share the knowledge article link with employees.
  - o Rate the knowledge article.

## How do I resolve a request?

Here's how you can resolve a help desk request.

You can use rich-text to create SmartText entries in request message fields by enabling HTML. Other fields, such as Problem Description and Solution Description only support plain text.

1. Open the Help Desk Request Overview page for the service request you want to resolve.
2. In the **Action Bar**, enter **Resolve**.

You can also enter synonyms such as **Close** or **Complete**.

3. Select **Resolve Service Request** from the list of suggested actions.

The **Resolve Service Request** panel is displayed.

**Note:** The values in the drop-down lists in the **Resolve Service Request** panel are configured by your administrator. The following steps are an example of the resolve flow based on the ready-to-use data provided in the application. You need to select the appropriate values for the service request.

4. From the **Status** drop-down list, select **Resolved**.
5. Select an **Outcome**.
6. Select a **Resolution**.
7. In the **Solution Description** field, enter the details explaining about the solution of the problem.

You can insert SmartText by typing # to display a list of plain SmartText entries, and type-ahead to progressively search and filter this list.

8. Click **Resolve**.



# 5 Message Center

## Internal Conversations

### Start an Internal Conversation

Messaging is the centralized hub for communication and team collaboration to initiate the conversation with other resources within your organization. You can start an internal conversation with other agents (or subject matter experts) to assist you in resolving a help desk request, through various channels.

Here's how you start an internal conversation:

1. Open the Help Desk Request Overview page for the help desk request where you want to initiate a conversation.
2. In the **Action Bar**, enter **Start**, and select **Start Internal Conversation** from the list. The **Internal Conversation** panel is displayed.
3. Select a **Channel Type** based on the type of message you want to create, and select the corresponding **Channel**:

If the Channel Type is	Here's What You Can Do	Channel to Select
<b>Email</b>	Send an email to the selected recipients.	Email channel
<b>Slack</b>	Send a message to a single Slack channel, or to multiple Slack users.	Slack workspace
<b>Web</b>	Send a message to the selected recipient within the Service Center application.	<b>Web</b>
<b>Microsoft Teams</b>	Send a message to a single Microsoft Teams channel or to multiple Microsoft Teams users.	Microsoft Teams

4. Select the recipients of the message in the **To** field.  
For **Email** channel type, you can also optionally select from the **Cc** and **Bcc** fields.  
Start typing a few characters and select the recipients from the **All Resources** list. You can also add additional recipients that aren't in the list.
5. Enter the content of the message.  
You can use SmartText entries by typing #.
6. To add an attachment to your message, click the **Attachment** icon and select the file to attach.

7. Click **Send**.

## Reply to Messages

Here's how you can reply to the various types of internal conversations.

- For Email channel type, reply from your email client.
- For Slack channel type, do one of the following in your Slack application:
  - Click **Reply to Help Desk Request** on the message that you receive from your Oracle Help Desk. Type your reply and press **Submit**.

When you reply this way, your reply is automatically created as a message on the request.

- Click **Reply** to use the native Reply action in Slack. You must also mention your company's app in the format `@AppName` in your reply.

Here, AppName is the name of your company's Slack app created for your Oracle Help Desk. When you mention your app in this format, your reply is created as a message on the request.

- For Microsoft Teams channel type, do one of the following in your Microsoft Teams application:
  - Click **Reply to Help Desk Request** on the message that you receive from your Oracle Help Desk. Type your reply and press **Enter**.

When you reply this way, your reply is automatically created as a message on the request.

- Click **Reply** to use the native Reply action in Microsoft Teams. You must also mention your company's app in the format `@AppName` in your reply.

Here, AppName is the name of your company's Microsoft Teams app created for your Oracle Help Desk. When you mention your app in this format, your reply is created as a message on the request.

- For Web channel type:
  - a. On the Home page, click **Help Desk > Quick Actions > My New Messages**.

The My New Messages List page is displayed. This page lists all new messages sent to you, which you haven't replied to yet.

**Note:**

- The messages that you have replied to, are displayed on the My Messages List page.  
To navigate to this page, on the Home page, click **Help Desk > Quick Actions > My Messages**.
- In the Filter bar, you can search for a message by the subject or sender name.

- b. Click **Reply** for the message you want to reply.
- c. Enter your message content and click **Send**.

**Note:**

- SmartText isn't supported in replies sent through the My New Messages List or My Messages List pages.
- To add an attachment to your message, click the **Attachment** icon and select the file to attach.

All internal conversation threads are displayed in the activity feed of the associated help desk request.



# 6 Actions and Plans

## Overview of Actions and Plans

### What's the Difference Between an Action and a Plan?

An action plan action is an individual event that needs to be done to close a help desk request.

Action plan actions can be tasks, activities, appointments, cases, opportunities, help desk requests, or service requests. Action Plan Actions are often called "Solo Actions." An action plan is a checklist, a series of action plan actions that are connected together and require completion before you can close a request. In this chapter, "action plan actions" are referred to as "actions", and "action plans" are referred to as "plans".

## Actions

### Add Individual Actions

Here's how you add solo actions to a help desk request:

1. Navigate to the Help Desk Request Detail page for the help desk request to which you want to add an action.
2. In the **Action Bar**, enter **Add Action** and press **Enter**.


You can also select it from the suggested actions in the Action Bar.

The list of available actions is displayed in the Action Bar.

3. From the drop-down list, select an action.

You can also search for the action name.

The selected action is displayed with the field values that are used to create the action, in the **Pending** region.



**Add Action**  
**DontEdit\_SR\_Action\_Automation\_01**

The following values are read-only and will be used in the action.

Title  
Automated SR - RWCHAT P1

Business Unit  
Vision Construction

Stripe Code

Cancel Submit

4. Modify any fields if required, and click **Submit**.

The selected action is displayed in the **Pending** or **Recommendation** region.

## View the Details of an Action

The actions and plans that have been applied to the selected request are in the Actions and Plans list of the Help Desk Request Details page.

The actions and plans are sorted with the next item due at the top of the list. Here's how to view action details:

1. Navigate to the Help Desk Request Details page.
2. Click the **More** icon (the vertical three dots icon) on the line for the action you want to view.
3. Click **View Details**.

Depending on the type of object, the details of the selected action are displayed either inline in the panel, or in a separate browser tab.

## Edit an Action

Here's how you can edit an action.

1. To mark an action as completed:
  - For an action in the **Pending** region, select the **Mark as Complete** check box for the action to mark as complete.
  - For an action in the **Recommendation** region, click **Mark as Complete** from the drop-down list.
  - For an action in the **Actions and Plans** panel, click **More** (the vertical 3 dots icon) > **Mark as Complete**.

The completed actions are listed in the activity feed.

2. To update notes for an action:
  - o For an action in the **Pending** region, click **More** (the vertical 3 dots icon) > **Update Notes**.
  - o For an action in the **Recommendation** region, click **Update Notes** from the drop-down list.
  - o For an action in the **Actions and Plans** panel, click **More** (the vertical 3 dots icon) > **Update Notes**.
  - o Enter your notes and click **Save**.
3. To modify the details of an action:
  - o For an action in the **Pending** region, click **Edit** or **Edit in Browser Tab**.
  - o For an action in the **Recommendation** region, click **View Details** or **Edit** (depending on the object type) from the drop-down list.
  - o For an action in the **Actions and Plans** panel, click **More** (the vertical 3 dots icon) > **View Details**.  
Depending on the type of object, the details of the selected action are displayed either inline in the panel, or in a separate browser tab.
  - o Edit the required fields and click **Save**.
4. To dismiss a recommendation, click **Dismiss** in the **Recommendation** region.  
Dismissed items are moved from the **Recommendation** region to the **Pending** region. The application displays other recommendations, if available. Otherwise, the **Recommendation** region is cleared.

## Plans

### Add Plans

Here's how you add a plan to a help desk request request.

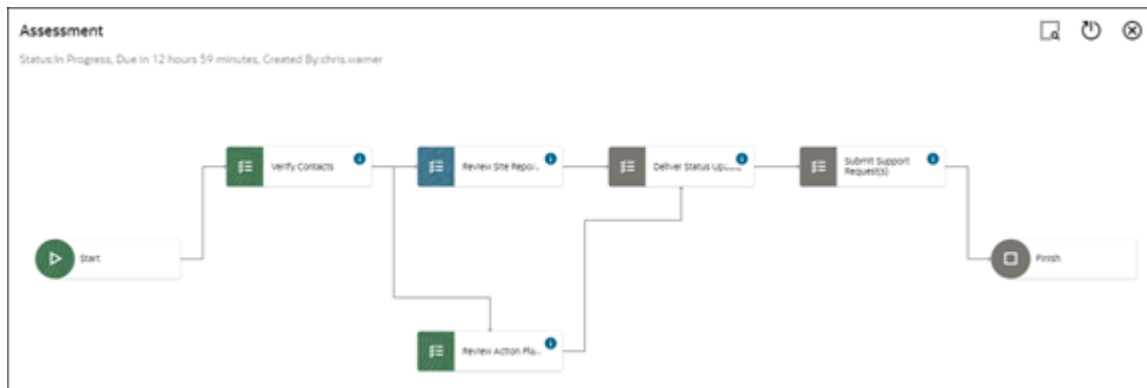
1. Navigate to the Help Desk request Details page for the request to which you want to add a plan.
2. In the **Action Bar**, enter **Add Action Plan** and press **Enter**.  
You can also select it from the suggested actions in the Action Bar.  
The list of available plans is displayed in the Action Bar.
3. From the drop-down list, select a plan.  
You can also search for the plan name.  
The selected plan is displayed in the **Pending** or **Recommendation** region.

### Edit a Plan

Here's how you can edit a plan.

1. On the Help Desk Request Details page, enter **show Actions and Plans** in the Action Bar.

2. To view the diagram view of the plan, click **More** (the vertical 3 dots icon) > **View Diagram**.



The diagram view shows a high-level view of the plan from start to finish. Click the horizontal 3 dots icon on each action to view the details of the action or mark it as complete.

**Note:** Diagrams aren't used for Action Plan Actions.

3. To refresh a plan with the latest updates to the associated request, click **More** (the vertical 3 dots icon) > **Refresh**.
4. To edit the notes for a plan, click **More** (the vertical 3 dots icon) > **Update Notes**.
5. To edit the associated actions in a plan:
  - a. Click the arrow to expand a plan.
  - b. Edit the required actions as specified in the "Edit an Action" topic: mark actions as complete, update notes, or modify the action's details.

# 7 APPENDIX: Using Classic HR Help Desk

## Create and Edit HR Service Requests

### Create and Edit HR Service Requests

As a Human Resources (HR) Help Desk Agent, you can create a service request (SR) on behalf of an employee.

#### To Create an HR Service Request

1. On the Home page, click **Navigator > Help Desk > HR Service Requests** to open the HR Service Requests page.
2. Click **Create Service Request** to open the Create Service Request page.
3. Enter a title for the SR.
4. In the **Primary Point of Contact** field, search and select the primary contact for the account that you selected. The primary contact's phone and email displayed are their work contact information.  
**Note:** The search returns only one row for an active employee because you can't view the entire work history for an active employee. The **Include terminated work relationships** check box on the Primary Point of Contact picker lets you assist employees that no longer work at the company.
5. Select the severity level of the request. You can select the **Critical** check box to include the SR in the reporting metrics about critical SRs.
6. Search and select a category for the SR, such as Benefits or Payroll.
7. Search and select a product.
8. Search and select the queue to the SR.
9. In the **Assigned To** field, search and select the resource that owns the service request.
10. Select a channel type through which the SR is sent to customer support.
11. Provide details for your SR in the **Service Request Details** field.
12. Click the **Manage Attachments** icon to attach any supporting documentation.
13. Click **Save and Continue** to continue creating the SR or click **Save and Close**.
14. If you click **Save and Continue**, the Edit Service Request page is displayed. Do steps 2 through 4 in the section **Editing an HR Service Request**.

#### To Edit an HR Service Request

1. On the Home page, click **Navigator > Help Desk > HR Service Requests** to open the HR Service Requests page.
2. Click the reference number for the service request that you want to edit. The Edit Service Request page is displayed.  
You can use the different tabs in the page to add more information about the SR. For example, you can do these actions:
  - o Add additional contacts, such as your manager or HR representative from the **Contacts** tab.

- You can also click the Add Manager button to add the manager of the primary point of contact.
- View existing, or add new team members to the SR resolution team from the **Team** tab.
  - Search, view, and link related articles that can help with SR resolution from the **Linked Articles** tab.
  - View changes to the application data, such as the business objects that were created, updated, and deleted from the **Audit History** tab.
3. Click the **Actions** menu button to perform tasks. For example, you can do these actions:
    - Obtain the URL for the SR by selecting the **Get Link** action.
    - Assign a queue to the SR by selecting the **Run Queue Assignment** action.
    - Update and refresh the SR milestones by selecting the **Update Service Request Milestones** action.
  4. Click **Save and Close**.

#### Related Topics

- [Create a Queue](#)
- [Edit a Queue](#)
- [Use Knowledge with Service Requests](#)

## Delegate an Employee to Create Service Requests on Behalf of a Manager

As a manager, you can delegate your role to any of your employees in your hierarchy to log Human Resources (HR) Service Requests on your behalf.

An administrator must first enable delegation for you so that you can delegate your role.

Here's how you delegate an employee to enter your service requests:

1. Sign in as a manager.
2. Navigate to **Roles and Delegations**.
3. On the **Edit User Account Details** page, scroll to the **Roles and Approvals Delegated to Others** region.
4. On the **Roles Delegated to Others** tab, click the **Create** icon.
5. Enter the **Role Name**. Your administrator should give you the role name when they enable the delegation for you.
6. Enter **Start** and **End Dates**.
7. Search for and select your delegate employee in the **Delegated To** drop-down list.
8. Click **Save**.

Your delegated employee can now create service requests on your behalf. When creating the service request, the employee can choose anyone in your employee hierarchy in the Point of Contact field of the service request.

#### Related Topics

- [How do I set up a delegation for users to create Help Desk requests on behalf of others?](#)

# Overview and Default Queue

## Overview of Queues

Queues are a collection of work items. You use queues to channel work to the right agents for resolution. For example, you might want to have queues that channel work items to agents that meet these criteria:

- Work in certain locations, such as New Jersey
- Speak a certain language, such as Spanish
- Have a certain skill, such as ASE certification
- Work the night shift, or have a combination of many different skills

There are several pieces involved in how a work item gets to an agent to work on. You set up queues and assign agents to them. Then you assign work items to queues either manually or automatically. Finally agents manually pick up work items from the queue or are automatically assigned work items using Omnichannel.

You can enable or disable queues, and place queues inside other queues. You can also set the priority of each work item within a queue.

### *Related Topics*

- [How do I automatically route chat work assignments to agents?](#)

## Creation of queues and how the default queue works

If you've enabled Omnichannel, there's a ready-to-use queue named Default. It's recommended that you have the Default queue Distribution field set to **Automatic** when Omnichannel is enabled. Available agents must also be associated with the Default queue.

Be aware that the Default queue contains work items that couldn't be assigned to any other queue because they don't match any of the defined assignment rules. You can add agents and teams to the Default queue and also change the queue properties, but you can't disable or delete this queue.

Depending on your requirements, you might want to create specific queues to route chats to a group of skilled agents. To do this, you can create additional queues, staff them with agents, and create your routing rules to assign chats to that queue. Here are the steps for creating queues:

1. Navigate to **Service > Queues**.
2. Enter a name for the queue.
3. Check the **Activation** field.
4. Set Distribution to **Automatic (Push)**.
5. Click **Save and Continue**.
6. Click the **Resources** tab.
7. Select agents to add to the queue.
8. Click **Apply** when finished.
9. Click **OK**.

**Note:**

- The ready-to-use Default queue acts as a catch-all queue for Help desk requests when assignment rules fail to evaluate matching conditions.

Here's what Oracle recommends:

- If you enable chat, you must set the Default queue to Automatic and assign agents to the queue. When the Default queue is automatic, all those chats that don't match any rules or they match a manual queue are assigned to the Default queue. If you set the Default queue to manual, such chats aren't routed to any agent, and no one would respond to those chats.

## Queues Dashboard

### Overview of the Queues Dashboard

Use the Queues dashboard to view statistical data about all queues such as the assignment mode, the number of agents assigned, and those interactions waiting to be assigned. Drill down on a queue to view information about pending work items within the queue.

Use this data to analyze and monitor routing. You can manually move interactions within a queue, to another queue, or you can assign the work item to an agent.

Work items can also be rerouted automatically based on assignment rules. If you click Reroute, and either the rules or properties have changed, the work item goes to a different queue. If the work item had previously been routed manually, rerouting assigns the work to the queue which corresponds to the automatic rules.

Once a work item is assigned to an agent, it's no longer listed on the Queue Dashboard.

**Note:** The **Queues Dashboard** page is refreshed depending on the value you select in the **Auto Refresh** drop-down list. Also, the Queues Dashboard displays only pending interactions.

*Related Topics*

- [Overview of Queues](#)
- [Reassign or Reroute an Interaction](#)

### How You View Queue Information

The Queues table on the Queues dashboard lists statistics about both real-time and non-real-time work items.

Field	What You Need to Know
Name	The queue name.  Click the <b>Name</b> link to open the <b>Summary</b> tab in the <b>Queue Details</b> window.

Field	What You Need to Know
Description	A description of the queue.
Enabled	Tells you if a queue is enabled or disabled. Select a value from the <b>Show</b> drop-down list to display <b>Enabled</b> , <b>Disabled</b> , or <b>All</b> queues.
Distribution	Specifies whether routing is automatic or manual.
Created	The date and time when the queue was created.
Agent	Lists the number of agents assigned to a queue, individually or as a part of a resource team.
Resource	Lists the number of resources assigned to the queue. Click the <b>Resource</b> link to open the <b>Resources</b> tab in the <b>Queue Details</b> window.
Resource Teams	Lists the number of resource teams that are associated with the queue. Click the <b>Resource Teams</b> link to open the <b>Resource Teams</b> tab in the <b>Queue Details</b> window.
Assigned	Lists the number of work items that are assigned to an agent. This value changes depending on the option selected from the Time Interval drop-down list. For example, to see the number of interactions that were assigned in the last 4 hours, select 4 Hours from the Time Interval drop-down list.
Waiting	Lists the number of work items currently waiting to be assigned, in the specified time interval.
Received	Lists the number of work items that came into the queue in the specified interval of time. This value changes depending on the option selected from the <b>Time Interval</b> drop-down list. For example, to see the number of interactions that were received in the last 8 hours, select <b>8 Hours</b> from the <b>Time Interval</b> drop-down list.
Abandoned	Lists the number of work items that were abandoned in the specified interval of time. This value changes depending on the option selected from the <b>Time Interval</b> drop-down list. For example, to see the number of interactions that were abandoned in the last 2 hours, select <b>2 Hours</b> from the <b>Time Interval</b> drop-down list.
Real-Time Capacity	Specifies the percentage of the total capacity that's available to handle real-time work assignments.
Non-Real-Time Capacity	Specifies the percentage of the total capacity to handle non-real-time work assignments.

## How You View Queue Channel Summary Information

The Channel Summary displays data related to all the real-time work items in the queue.

Field	What You Need to Know
Real-Time Channel	The type of a real-time channel.
Waiting	The number of real-time notifications currently waiting to be assigned.
Assigned	The number of assigned real-time interactions..  This value changes depending on the option that's selected from the <b>Time Interval</b> drop-down list. For example, to see the number of interactions that were assigned in the last 4 hours, select 4 Hours from the <b>Time Interval</b> drop-down list.
Average Wait Time	The average time period that a real-time interaction waited in the current queue before it was assigned to an agent.  This value changes depending on the option that's selected from the <b>Time Interval</b> drop-down list. For example, to see the average wait time of a real-time interaction in the last 2 hours, select <b>2 Hours</b> from the <b>Time Interval</b> drop-down list.
Received	The number of real-time interactions that were received.  This value changes depending on the option that's selected from the <b>Time Interval</b> drop-down list. For example, to see the number of interactions that were received in the last 8 hours, select 8 Hours from the <b>Time Interval</b> drop-down list.
Abandoned	The number of real-time interactions that were abandoned.  This value changes depending on the option that's selected from the <b>Time Interval</b> drop-down list. For example, to see the number of interactions that were abandoned in the last 2 hours, select 2 Hours from the <b>Time Interval</b> drop-down list.

## How You View Queue Interactions Information

The interactions grid shows you details about all of the interactions in a selected queue. By default this grid only lists real-time interactions. To display non-real-time interactions, select the Show Nonreal-Time option.

Field	What You Need to Know
Interaction	The date and time when the interaction was created.

Field	What You Need to Know
Channel	The type of communications channel.
Reference ID	An identifier of the work item that's associated with the interaction, for example, SR number.
Customer	The customer who started the interaction.
Account	The customer's account.
Wait Time	How long the interaction has been waiting in the current queue. This value is reset each time an interaction is assigned to a new queue.
Number of Queues	The number of queues the interaction has been assigned to. When an interaction is moved from one queue to another, this counter increases by one. For example, if an interaction was moved to 3 different queues after it was created, the Number of Queues value is set to 3.
Rules Time	The time taken to assign the interaction to the current queue. This value is displayed in <b>HH:MM:SS.mmm</b> format.
Trace	Routing history of the interaction.  Click the <b>View</b> link to open the <b>Interaction Trace</b> window.

*Related Topics*

- [Reassign or Reroute an Interaction](#)

## Work with Queues

### Create a Queue

You must be a service administrator or service manager to do this task.

1. Click **Navigator > Queues**.
2. On the Queues page, click **Create Queue**.
3. In the Create Queue dialog box, give the queue a name and, if needed, a description.
4. Select the **Enabled** check box.

Your queue must be enabled before you can add work items to it.

5. For the **Distribution** option, select **Manual** or **Automatic**.
  - o Select Manual if you want to add work items and assignments to this queue manually.
  - o Select Automatic if you want Assignment Manager to do it for you.

6. (Optional) The **Routing** option is applicable only if you select the Automatic distribution option in the previous step. Select one of the following:

- Select **Use Omnichannel Routing** if you want to use the built-in Omnichannel routing for this queue. This option is selected by default.
- Select **Use Third-Party Routing** if you want the work objects from this queue to be routed to a third-party routing service.

**Note:** To use this service, you must register the partner. For more information about registering the partner using REST APIs, see the REST API for Oracle Fusion Cloud Sales.

- From the **External Partner** drop-down list, select the partner.

7. (Optional) If applicable, select the **Assign pending interactions to overflow resources** check box.

**Note:** Only if you select the **Use Omnichannel Routing** option, you can see the **Overflow Criteria** section of the page. This section is applicable only when you want to enable overflow resources for a queue.

For more information, see "Add Overflow Queues to a Queue" and "Enable Overflow Resources for a Queue".

8. Do one of the following:

- Click **Save and Close** if you're done.
- Click **Save and Continue** if you want to add agents and teams to your new queue.

## Edit a Queue

You can rename a queue, enable or disable it, or set it to be manual or automatic.

Make sure you understand the consequences of the changes you're about to make, though. Refer to the Changing Queue Properties topic for more information.

1. Open the Queues list.
2. On the Summary page, click the queue name, and make your changes.
3. Click **Save and Close** to close the window after saving, or click **Save** to save without closing the window.

**Note:** You can see the audit trail of changes made to a queue in the Change History tab in the queue Summary page. But you can see the Change History tab only if your administrator has done the following:

- Assigned the SVC\_VIEW\_QUEUE\_CHANGE\_HISTORY privilege to your role.
- Exposed the Change History tab using Application Composer.

## What happens when I change queue properties?

Here's what happens when you change the properties of an existing queue.

Change	What happens	What you need to do
Disable an active queue	<ul style="list-style-type: none"> <li>The queue still appears in the UI in the Queues list. It doesn't appear in other locations, such as when editing an SR, or in searches during a queue assignment.</li> <li>Assignment Manager continues to assign work items to the queue without assigning an agent (just like in a manual queue).</li> <li>Any unassigned work items in the queue remain unassigned.</li> </ul>	<ul style="list-style-type: none"> <li>Delete any assignment rules associated with the queue.</li> <li>Manually assign any unassigned work items in the queue.</li> </ul>
Change an automatic queue to manual	Any new or existing work items in the queue are no longer automatically assigned.	Manually assign these work items.
Change a manual queue to automatic	<ul style="list-style-type: none"> <li>Existing work items in the queue at the time of the change aren't routed automatically.</li> <li>Any new work items that come into the queue are routed automatically.</li> </ul>	Manually assign existing work items.
Rename a queue	Renaming a queue doesn't affect work items already in a queue. However, Assignment Manager will continue to assign work items to the renamed queue using the existing assignment rules.	You don't need to do anything.

## Delete a Queue

You can delete a queue in most cases, but there are exceptions. You can't delete the default queue and queues with open work items and assignment rules.

To delete a queue, just do this:

1. Open the Queues list.
2. On the Summary page, click **Actions**, and then **Delete Queue**.

## Search for a Queue

On the Queues page, you can search for specific queues based on any of the following criteria:

- Name
  - Description
  - Distribution type
  - Whether the queue is enabled or disabled
1. On the Queues page, click the **View** drop-down list.
  2. Click **Query by Example**.

A search row with boxes appears at the beginning of the list of queues.

3. In the search row, specify one or more of the following queue attributes:
  - o Name of the queue
  - o Description of the queue
  - o Enabled, Disabled, or All, depending on the type of queue you're searching for
    - i. Click in the search box for the **Enable** column.
    - ii. From the three options displayed, select the one that you want.
  - o Distribution type of the queue: Auto, Manual, or All
    - i. Click in the search box for the **Distribution** column.
    - ii. From the three options displayed, select the one that you want.

One or more queues that fulfill your selection criteria are displayed.

4. Select the queue that you want from the list.

## Assign Agents

### How do I assign agents to work items?

You can assign agents manually or automatically based on the Distribution option you select for the queue.

In a manual queue, the service manager or an agent with the correct permissions assigns or reassigns each work item to an agent. Agents can also assign work items to themselves.

In an automatic queue, assignment of work items is automatic, based on assignment rules. Agents assigned to the queue can receive work items if they meet all these criteria:

- Signed in to the application
- Available to accept work orders
- Can take on more work

**Note:** Remember, you can use automatic queues only if your administrator has enabled Omnichannel.

When you assign agents to multiple queues, be aware that capacity limits are calculated for individual queues. So, if you assign an agent to multiple queues they might get overloaded.

# Agent Availability and Presence

## Set Presence and Availability

Work assignments are determined by your availability, so once you sign in to the application, set your presence and availability with the user menu.

You can explicitly specify your availability for real-time and non-real-time work items. This means that you can specify if you're available for chat or for an SR assignment, or for both. By default, you're shown as available for non-real-time interactions when you sign in.

Agent presence is different from availability in that it indicates only whether you're signed in to, and are working with, the application. Set presence in **Settings and Action** menu. Your status can be either Available or Busy, and you can toggle between statuses. The following table shows how work assignments based on availability and presence.

Accepting Work	Presence	Work Assignment
Non-real-time	Available	The SR is routed to the agent.
Non-real-time	Busy	The SR is routed to an agent and a notification is displayed. If the time-out period is nearing, a bold notification is displayed. Click the notification to accept the assignment. If you're presence is set to busy for an extended period of time, the SR is assigned to another agent.  The availability to receive non-real-time work is also turned off.
Non-real-time	Offline	If the agent is signed out of the application, the status is set to offline. No new SRs are assigned, but the SRs that are already assigned are still owned by the agent.
Real-time	Available	Chat notifications are sent to the agent.
Real-time	Busy	Chat availability is turned off.

**Note:** If your administrator enables the SVC\_OMNI\_DISABLE\_WORK\_ITEM\_AVAILABILITY\_SELECTION profile option, you can't change your work and chat availability through the Omnichannel toolbar. Based on the profile option settings, the application assigns new work to you until your maximum capacity is reached. For more information, see "Enable Omnichannel".

## Related Topics

# Queue Owners

## Why assign an owner to a queue?

It's a good idea to have queue owners if you find you've specific customer requests like if they want more information or a demonstration. That way the queue owner can manually assign suitable resources.

When a new work item is assigned to a queue, the queue owner receives a notification. If required, the owner can override the automatic assignment of a request and manually assign the request to a specialized or specific resource. If the owner thinks that the automatic assignments are fine, the owner need not take any action.

**Note:** If you're an administrator or manager, you can assign owners to queues on the Queues page. Depending on your settings, you can also assign queue owners while creating or editing a queue.

You must complete the following processes:

- Add the Queue Owner field to the page layouts for queues (You need to do this step only once.)
- Assign a queue owner for a queue

## How do I add the queue owner field to the page layout?

To add the Queue Owner field to the page layouts for queues follow this one-time process:

1. Sign in to the application as an administrator or setup user.
2. Within a sandbox, navigate to **Application Composer**.
3. In the **Application** field, select **CRM Cloud** from the drop-down list.
4. Search for `queue`.
5. Click **Standard Objects > Queue**.
6. Click **Pages**.
7. Depending on your company's requirements, add the **Owner** field to some or all of the following page layouts for queues: **Landing Page Layouts**, **Creation Page Layouts**, and **Details Page Layouts**.

## Assign an Owner to a Queue

Once you add the Queue Owner field to the queues page layouts, you can assign an owner to a queue anytime.

1. On the Queues page, select the name of the queue for which you want to assign an owner.
2. In the **Name** column, click the name of the queue.
3. In the Summary page, click the **Owner** drop-down list.
4. Search for and click the name of the owner from the displayed list.

**Note:** You can also start typing the name that you're searching for, and click **Search**.

5. Click **Save**.

The queue is assigned to the owner that you selected.

**Note:** You can also assign a queue owner to a queue while creating or editing a queue, depending on how you modify your page layouts.

## Queue Resources and Resource Teams

### Add Resources to a Queue



You use a queue to group resources based on a specific criteria. So, to handle a queue, add resources that match the criteria.

1. Sign in to the application as a service administrator or a service manager.
2. On the Home page, click the Service group icon, and then click the Queues icon.
3. On the Queues page, click the queue that you want to update.
4. On the Summary page, click the Resources icon.
5. On the Resources page, click **Add Resources**.
6. On the Add Resources page, enter the search criteria such as the resource name.
7. Click **Search**.
8. Select the resources from the search results.
9. Do one of the following:
  - o Click **Apply** to add the selected resources to the queue and stay on the same page.
  - o Click **OK** to add the resources and leave the page.

### Add Resource Teams to a Queue

You use a queue to group resources based on a specific criteria. Apart from adding individual resources to a queue, you can also add resource teams with specific skill sets that match the criteria.

1. Sign in to the application as a service administrator or a service manager.
2. On the Home page, click the Service group icon, and then click the Queues icon.
3. On the Queues page, click the queue that you want to update.
4. On the Summary page, click the Resource Teams icon.
5. On the Resource Teams page, click **Add Resource Teams**.
6. On the Add Resource Teams page, enter the search criteria such as the resource team name.
7. Click **Search**.
8. Select the resource teams from the search results.

9. Do one of the following:
  - o Click **Apply** to add the selected resource teams to the queue and stay on the same page.
  - o Click **OK** to add the resource teams and leave the page.

The resource teams are added to the selected queue.

## Overflow Resources

### Overflow Queues

Sometimes, the currently assigned resources for a queue are unable to keep up with incoming work or they aren't available. You can add overflow or backup queues for every queue so that alternative resources are available in such situations.

Overflow queues contain a reserve pool of agents to handle the workload when required. The waiting time for the customers is minimized by using overflow queues.

You can choose one of the following criteria for setting up an overflow queue:

- **When no human agent is immediately available**

This condition is met if the main queue has even one work item waiting to be assigned.
- **When actual wait time exceeds threshold**

For example: If a work item has waited in the main queue for more than 10 minutes, then assign the work to the agents in the overflow queue.
- **When number of pending interactions exceeds threshold**

For example: If the main queue has more than 10 work items, then assign the work to the agents in the overflow queue.

Here are some key points about overflow queues:

- A work item itself always stays in the main queue. Routing only considers the agents in the overflow queue when required, but the work item itself never moves from the main queue.
- Routing considers the agents in the overflow queue only if the overflow criteria are met. If any agent from the main queue is available to take the work, then routing selects that agent first because it considers them more suitable.
- Routing assigns a work item to the overflow queue agents only if the overflow queue is empty. If an overflow queue already has some pending items, this means that those agents are already busy.
- You can add overflow queues to any automatic queue.
- You can add any number of overflow queues to a queue.
- Overflow queues enable you to bring in additional or backup resources dynamically when required.
- If you have added more than one overflow queue, Omnichannel considers them in the priority order in which you've defined or added them. If the first overflow queue isn't empty, Omnichannel considers the next one, and so on.

**Note:** If no overflow queue resources are available, the work item remains pending in the current queue. The item remains pending until a resource is available in the current queue or in one of the overflow queues.

Overflow queues are available for a queue only after you complete the following processes in the given order:

1. [Add Overflow Queues to a Queue](#)
2. [Enable Overflow Resources for a Queue](#)

## Add Overflow Queues to a Queue

To add overflow queues as a backup for any queue:

1. Sign in to the application as a service administrator or a service manager.
2. On the Home page, click the Service group icon, and then click the Queues icon.
3. On the Queues page, click the queue that you want to add overflow queues to.
4. On the Summary page, click the Overflow Resources icon.  
The Overflow Resources page is displayed. The overflow queues list is initially empty.
5. Click the arrow in the Select:Queue Name drop-down list.  
The list of existing queues that are enabled, automatic, and are not routed externally, is displayed.
6. Search for and select the queue that you want to add as a backup queue.
7. Click **Add**.  
The selected queue is added to the list of overflow queues. The priority value is one greater than the priority value of the last added queue in the list. For example, if the priority of the last added queue is 3, the fourth one is assigned a priority of 4. For the first queue that you add, the priority is 1.
8. Select and add more queues if required.  
The Default queue isn't added as an overflow queue by default. If you want to add the Default queue, you must add it from the **Select:Queue Name** drop-down list. The priority value is one greater than the priority value of the last added queue in the list.
9. Click **Save**.
10. (Optional) To reorder the priorities of the queues in the list, click the Up arrow to increase the priority or the Down arrow to decrease the priority.  
**Note:** Queues with a lower priority value are considered first by Omnichannel as the overflow queue.
11. (Optional) To sort the list of overflow queues by name, click the **Sort Ascending** or **Sort Descending** arrows next to the **Name** column in the heading row of the list.
12. (Optional) To sort the list of overflow queues by priority, click the **Sort Ascending** or **Sort Descending** arrows next to the Priority column in the heading row of the list.
13. (Optional) To delete a queue from the overflow queues list, select the row and click **Delete**.
14. Click **Save** to save the changes and remain on the page or click **Save and Close** to leave the page.

**Note:** After you add the overflow queues, you must enable the overflow queues as described in the "Enable Overflow Resources for a Queue" topic.

### Related Topics

- [Enable Overflow Resources for a Queue](#)

## Enable Overflow Resources for a Queue

After you add and save an overflow queue, you can enable or disable it at any time. Also, the saved configuration of the overflow queue applies each time you enable it, so you don't need to reconfigure it every time you use it.

For more information about how to add overflow resources to a queue, see "Add Overflow Resources to a Queue".

Here's some typical scenarios where you may need to enable overflow resources for a queue:

- Non-business hours when current resources may be unavailable.
- A holiday season when current resources have an increased workload but you still need to maintain customer SLAs.
- When queue behavior shows that your agents are unable to cope up with their workload.

Once enabled, you can choose from one or more conditions in which the overflow queues or resources are considered. When one of the specified conditions are met, Omnichannel expands the pool of agents to serve the current queue by including agents from overflow queues.

**Note:** You can edit a queue that's set as an overflow resource and disable it at any time. Once an overflow queue is disabled, it isn't considered when an agent is selected. The disabled queue does still appear in the list of overflow resources, though.

To enable overflow resources for a queue:

1. Sign in to the application as a service administrator or a service manager.
2. On the Home page, click the Service group icon, and then click the Queues icon.
3. On the Queues page, click the queue that you want to update.
4. On the Summary page, navigate to the **Overflow Criteria** section.
5. Select the **Assign pending interactions to overflow resources** check box.

The overflow resources configured for this queue in the Overflow Resources tab are available to the queue.

6. Select one of the following conditions. When the selected condition is met, the overflow resources are used by the queue:
  - **When no human agent is immediately available**
  - **When actual wait time exceeds threshold**
    - **Real-Time:** Enter the number of seconds that must pass before a pending real-time interaction is assigned to an overflow resource. Real-time interactions include chats and videos.
    - **Non-Real-Time:** Enter the number of hours that must pass before a pending non-real-time interaction is assigned to an overflow resource. Non-real-time interactions include service requests.
  - **When number of pending interactions exceeds threshold**
    - **Real-Time:** Specify the threshold limit for the number of pending real-time interactions. When this limit is exceeded, the pending interactions are assigned to an overflow resource.
    - **Non-Real-Time:** Specify the threshold limit for the number of pending non-real-time interactions. When this limit is exceeded, the pending interactions are assigned to an overflow resource.

### Related Topics

- [Add Overflow Queues to a Queue](#)

## Individual Capacity Settings

### Why would I override individual capacity settings?

Capacities for agents are set at the same global level. However, if you're a customer service manager, you can override the global maximum capacities and set maximum capacities for individual agents.

You can allocate more work to agents with higher skills and efficiency, and keep workloads lighter for newer agents, or those still in training. Another common scenario is when a queue owner reviews reports and sees a requirement to increase chat capacities to improve Key Performance Indicators.

The Edit Capacities page displays the capacities for both real-time and non-real-time work items that can be handled by agents. You can modify the capacities on this page by overriding the default capacities.

**Note:** You can modify the capacities only if your administrator has enabled the ability to override individual capacities. For more information about setting channel capacities and enabling override of individual capacities, see the Oracle Fusion Cloud Fusion Service Implementing Fusion Service guide.

### Key Benefits

Overriding individual capacity settings is good for the following reasons:

- You can search for individual agents or teams and modify their capacities.
- You can select a queue, review the capacities for the individual and team resources associated to the selected queue, and then, if you want, override the individual default capacities.
- You can filter the list of agents in a team, and view a list of only high performing agents who can manage more chat offers.
- You can receive in-line or bulk capacity updates for agents that you select.
- You can retain individual capacity changes if the individual capacity override capability is disabled.

**Note:** If the individual capacity override capability is disabled, your overridden capacities are reset to the global values. But, the modified values are saved in a table. If the capacity override is enabled again, the overridden capacity values that were saved are applicable again.

### Related Topics

- [Override Individual Capacity Settings](#)
- [How do I set channel capacity?](#)

## Override Individual Capacity Settings

To override individual capacity settings:

1. Sign in to the application as a customer service manager.
2. On the Home page, click the Service group icon, and then click the **Queues** icon.

The Queues dashboard is displayed.

3. Click the **Capacities** button.

The Edit Capacities page displays information in the following format:

- o **Agent Name:** Name of the agent.
- o **Teams:** Name of the team to which the agent belongs.
- o **Queues:** Names of the queues to which the agent is assigned.
- o **Service Request (n):** Maximum number of service requests that the agent can handle. The number n within brackets is the global default capacity.
- o **Chat (n):** Maximum number of chats that the agent can handle. The number n within brackets is the global default capacity.
- o **Video (n):** Maximum number of video chats that the agent can handle. The number n within brackets is the global default capacity.
- o **Last Updated:** Date and time when the capacities for the agent were last modified. If the capacities for multiple channels were updated for the agent, the modification date and time for each channel are displayed separately.

**Note:** To modify the capacities of the agents assigned to a queue, select the queue in the Queues dashboard and then click the **Capacities** button. The Edit Capacities page displays the list of agents assigned to the selected queue.

4. Select individuals or teams to modify their channel capacities:

- o To select an individual:

- i. Click the **Agents** drop-down list and click **Select Individuals**.

The Add Agents page is displayed.

- ii. Search for an agent by specifying the first name, last name, or other criteria provided on the page. You can also use a combination of multiple criteria.
- iii. Click **Search**.

The list of agents matching your search criteria is displayed in the Search Results section.

- iv. Select the agents who you want to add and click **OK**.

The selected agents are added to the list in the Edit Capacities page.

- o To select a team:

- i. Click the **Agents** drop-down list and click **Select Teams**.

The Add Teams page is displayed.

- ii. Search for a team by specifying the team name or other criteria provided on the page. You can also use a combination of multiple criteria.
- iii. Click **Search**.

The list of teams matching your search criteria is displayed in the Search Results section.

- iv. Select the teams that you want to add and click **OK**.

The agents who are members of the selected teams are added to the list in the Edit Capacities page.

5. Review the capacities of the agents in the list.

6. To edit the capacity for service requests, chats, or videos for an agent in-line, click the Up or Down arrows to increase or decrease the capacity respectively.

To edit the capacities for multiple agents in bulk:

- a. Select the agents and click **Edit**.

The Edit dialog box is displayed.

- b. Modify the capacities as required and click **Save and Close**.
- c. If you want to set the capacities back to the default values, click **Set to Default**.

7. (Optional) If you don't want to make any changes for some of the agents in the list, select those agents and click **Remove**.

To remove a single agent from the list, click **Remove** in the row.

**Note:** Clicking **Remove** doesn't disassociate the agent from a queue or remove the overridden capacity of the agent from the database table, but only removes the agent from the list on this page.

8. (Optional) To revert the changes made to the capacities of one or more agents in the list:

- a. Select the check box at the beginning of the row for each of those agents.
- b. Click **Set to Default**.

If the capacities of the selected agents were overridden or if you had modified them on this page, they're again set to the default global capacities.

9. Do one of the following:

- o Click **Save** to save the changes and remain on the page.
- o Click **Save and Close** to save the changes and exit from the page.
- o Click **Cancel** if you decide to discard the changes that you made.

#### *Related Topics*

- [Why would I override individual capacity settings?](#)
- [How do I set channel capacity?](#)

## FAQs for HR Service Requests

### How can I reassign an HR service request?

You can reassign an active service request (SR) from the Summary tab in the Edit Service Request page. In the Assigned To list, search and select the person you want to reassign the SR.

### How do I use smart text in HR service requests?

You can set up smart text when you start working on a service request (SR). Smart text helps you to quickly send a response or update without retyping text every time you work on an SR.

On the Edit Service Request page, click the arrow on the Restore Pane. To insert smart text, select the field where you want to insert smart text. Then, do one of these actions:

- Enable the SmartText icon for the field and search and select the smart text that you want to insert.
- Click the SmartText tab in the Restore Pane and search and select the smart text that you want to insert.

#### *Related Topics*

- [How You Use SmartText in Service Requests](#)