Oracle Fusion Cloud Applications

Fusion Service Questions and Answers

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Contents

ORACLE

ORACLE

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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

Some application pages have help icons ⑦ to give you access to contextual help. 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. If the page has contextual help, help icons will appear.

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*.

Thanks for helping us improve our user assistance!

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1 Questions and Answers

How can I prevent a new SR from being created when a customer replies to an email notification that's set up using groovy scripts or object workflow?

For all outbound emails generated by your service application, the message ID is automatically added at the end of the email in the format {##Messageid##}. When someone replies to such an outbound email or forwards it, the application uses these values to identify the parent SR.

But let's suppose you've created a groovy script or an object workflow to send an email notification when an SR is resolved. And this notification doesn't have the **{##Messageid##}** or **{##SrNumber##}** tags at the end of the message. So when your customer's SR is resolved, they receive a notification without the identifying tags. Now let's say the issue recurs for the customer. Instead of replying to an earlier mail thread, they may reply to this notification. Then the application isn't able to identify the original SR because it doesn't contain the tags at the end of the notification. So the application considers it as a new SR. The same issue occurs if someone forwards that notification back to the application.

To prevent the application from creating new SRs in such situations, you must do the following. At the end of the message content of your outbound email notification, ensure that you add either the message ID in the format **{##MessageId##}** or the SR number in the format **{##SrNumber##}**.

> **Note:** You can verify the exact format of these tags from any sample acknowledgment email that's sent after an SR is created from an inbound email.

How do I create a custom field?

Create a custom field in Application Composer if you want changes retained to the database. Custom fields created in VB Studio are read only.

This example shows you how to create a custom field using Application Composer.

We'll create a new field for the Service Request **Category** object. Say you want to extend this object with a custom field that's specific to your business needs. In addition to creating the custom field in Application Composer, you'll also need to add the custom field to the appropriate layout which is described in the following section. When both of these steps are performed, then the new field can be exposed in the Manage Service Request Categories List page.. You might also want to make the content entered into this custom field searchable. Here's how you do it:

> **Note:** You'll need to create and activate a sandbox to perform this task. Use the same sandbox used for this task when you add the field in VB Studio, which is described in the next task.

1. Sign in to your application as an administrator.

2. Click **Navigator > Configuration > Application Composer**.
3. Expand the **Standard Objects** list, then expand the **Category** object node.
4. Click **Fields**.
5. On the Fields screen, click the **Custom** tab, then click the **Action** drop-down list and select **Create**.
6. Select **Text** because for this example, we'll just create a text field.
7. Click **OK**.
8. In the Create Text Field screen enter the field name into the **Display Label** field.
   The Display Label field displays the field name in the UI. The Name field auto-fills after you complete the display label, and is only for internal use. It won't be displayed in your UI.
9. Choose the number of characters you want to allow in the new text field.
   The default number of characters is 30, but you can set it for less or for more.
10. If you want the field to be searchable, select the **Searchable** check box in the Constraints area.
11. Click **Save and Close**.
12. To add the field in VB Studio, follow the steps in the next procedure.

How do I assign users to a user group in Knowledge?

Knowledge management has user groups that you can use to control who can see which articles in the knowledge base. Users assigned to a user group can only access the articles targeted for that user group. The predefined user groups help in segregating articles that should only be viewed by users within the organization. You can create custom user groups to segment content for additional audiences.

Note: This answer is applicable to both Fusion Service Knowledge Management with Redwood and Classic User Experience.

You can create, update, and delete user groups to control access to published knowledge articles. You must have the knowledge manager role, or a similar role that includes the Knowledge Setup and Maintenance privilege to create user groups.

To create a user group:

1. Go to Setup and Maintenance.
2. Select the **Service** offering and select **Knowledge Management**.
3. Select the **Manage Knowledge User Groups** task.
4. Select **Service** from the **Department** menu and click **+** to add a new user group.
5. Enter a unique name and reference key for the user group.
6. Click **Create**.

Note: To grant a user access to any content that is assigned to a user group other than EVERYONE, you must assign the user:

- a role with a Data Security Policy (DSP) that grants access to the intended department

- a role with a DSP that grants access to one or more user groups

You must ensure that the department DSP is related to the same department (such as HCM, Internal Help Desk, or Service) as the user group DSP. For example, if a user role only has an HCM department DSP and a Service user group DSP, then a user assigned to this role will not have access to articles with the user group specified in that Service user group DSP.

Define a User Group Data Security Policy in a Role

You must have privileges to access the Security Console to define a Data Security Policy.

You can edit a role to add a data security policy for the user group you have created.

1. Go to **Tools** > **Security Console** > **Roles** page and locate and open the role that you want to add the user group data security policy to.
2. Edit the role and go to the Data Security Policies page.
3. On the Data Security Policies page, click **Create Data Security Policy** and change the start date if you need to.
4. Enter a policy name.
5. For **Data Resource**, search for and select "Knowledge User Groups", and click **OK**.
6. For **Data Set**, select **Select by key**.
7. Enter the user group reference key in the **Select a primary key value** field.
8. In the **Actions** field, select **Access Content with User Group**.

You can view the new policy on the Data Security Policies page by scrolling to the end of the list of policies. You can accept the default role hierarchy and click **Next** to continue. The user group data security policy will apply to users who have the role that you updated.

Define a Department Data Security Policy in a Role

You must have privileges to access the Security Console to define a Data Security Policy.

You can edit a role to add a data security policy for a department.

1. Go to **Tools** > **Security Console** > **Roles** page and locate and open the role that you want to add the department data security policy to.
2. Edit the role and go to the Data Security Policies page.
3. On the Data Security Policies page, click **Create Data Security Policy**.
4. Enter a policy name.
5. For **Data Resource**, search for and select "Knowledge Departments", and click **OK**.
6. For **Data Set**, select **Select by key**.
7. Enter the department reference key in the **Select a primary key value** field.
8. In the **Actions** field, select **Access Content with Department**.

You can view the new policy on the Data Security Policies page by scrolling to the end of the list of policies. You can accept the default role hierarchy and click **Next** to continue. The department data security policy will apply to users who have the role that you updated.

Assign the Updated Role to Additional Users

You can add users to the role that has the new user group data security policy as needed. See the *Oracle Fusion Cloud Customer Experience Securing Sales and Fusion Service* guide for additional ways of assigning users to roles.

1. On the Update Role: Users page, click **Add User**.
2. In the **Add User** dialog box, search for and select a user or role.
   - Select a single user to add only that user to the role, then click **Add User to Role** to add the user.
   - Select a role to add all of users assigned to it, then click **Add Selected Users** to add them.
3. Click **Submit**.
   The Create Role: Users page shows the updated role membership.

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How do I add a custom field created in Application Composer?

Use this topic to add a custom field you created in Application Composer. Fields that you create in Application Composer allow you to retain changes to the database, whereas custom fields created in VB Studio are read only.

This topic shows you how to add a custom field that you created in Application Composer to a layout in VB Studio.

Before you start

Make sure VB Studio is connected to the same sandbox that you used when creating the custom field.

Here's what to do

1. In VB Studio, click the **Layouts** icon in the explorer.
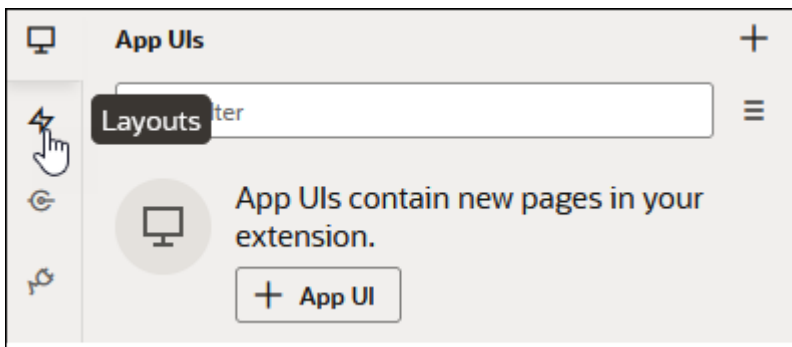
2. Find the object you want to add the field to.
3. In this example, we'll use the **Categories** object, so click that object.
4. Display the rule sets, and then choose the one you want to add the field to.
5. For this example, choose **Category Details**.
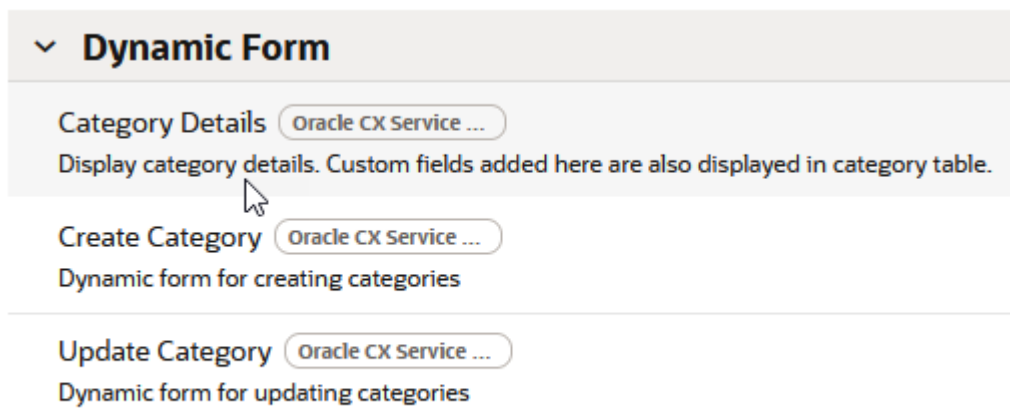
6. Duplicate the form using the following task: *How do I duplicate a form in Visual Builder?*.
7. Open the duplicate you created.
8. The workspace displays the fields that are contained in the form, and those that can be added.

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9. From the list of available fields, find your new field, using the filter field to search if necessary.

10. Drag the new field to the form, and position it in the order you want. You can use *How do I add, hide, or rearrange fields?* for reference.

11. The field is now added to the form. Click the **Preview** button to view your changes in the application UI.

What are service request classifications?

When your customer sends a service email for a new issue, the email is converted to a Service Request (SR). You can quickly classify SRs by auto-populating the Product, and Category fields. Use the Service Request (SR) Classification feature, which applies to requests created by the inbound email channel, to streamline the overall process of categorizing and assigning SRs.

The request should have its Title, Problem Description, and Primary Point of Contact prepopulated. However, fields such as **Category** and **Product** that are useful in routing the request to its proper queue and assignee are blank. By enabling the Service Request Classification feature, the **Product**, and **Category** can be auto populated when the request is created. The agent doesn't need to populate it manually. This feature applies to requests created by the inbound email channel.

Note: This feature is currently available for English language only.

Attribute predictions come from the Adaptive Intelligence (AI) applications platform that's already provisioned for you.

Here's a brief outline of how the SRs are classified:

1. The database contains records of all resolved requests created from past inbound emails. These requests have either product, category, or both already populated. Resolved requests are considered correct for building the Machine Learning (ML) model within the AI application.

    Note: Correct model predictions rest on the fact that historical resolved requests have correct labels.

2. You must activate the tenant from the Configure SR Classification Using Adaptive Intelligence page. After you activate the tenant, data from closed requests is imported by the AI application.

3. The AI model automatically learns, so it returns the predicted product or category based on data from closed requests in Fusion Service.

4. Based on analysis of the subject line and body of the email, the model classifies requests and returns products and categories that have the highest confidence.

5. While reviewing the assigned request, an agent can manually update the AI-labeled fields, if required.

How do I run the Publish Feed Elements job to index activities?

During initial Service setup, the activities for all your existing records are blank. You must run the Publish Feed Elements job to populate activities for each record with the date and time of the record was created. The process also publishes the indexes required for the Adaptive Search to track activities for all the objects that have activities enabled. You can't run the process separately for individual objects.

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> **Note:** You run this process only once during initial Service Center setup.

1. Click **Navigator > Tools > Scheduled Processes**.
2. On the Scheduled Processes Overview page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, leave the type as **Job**.
4. In the **Name** field, type **Publish Feed Elements**, and press **Enter**.
5. Make sure that the **Production to Test Enabled** checkbox is unselected. You use this option only to migrate the activity indexes from production to test as part of your data migration.
6. Continue to the next steps. Or, just skip to the steps for finishing the submission, to run the process once as soon as possible with the default output.

Which records get populated with activities?

The Publish Feed Elements process populates activities in records that meet the following criteria:

Object	Criteria
Account	All accounts of type Customer and Prospect with any tasks and appointments added in the last 300 days.
Contact	All contacts that were updated in the last 300 days.

The process also populates activities for child objects of the objects that meet the preceding criteria.

Account

Child Object	Criteria
Activity Type = Appointment	All activities of type Appointment that haven't passed the due date. All activities of type Appointment that have passed a due date 180 days from the current date.
Activity Type = Task	All activities of type Task that have the following status: Not Started, In Progress, and On Hold. All tasks in Completed status that has passed the due date 180 days from current date
Notes	All available notes that were created or updated in the last 180 days.
Audit	Audit log that shows the Created By and Updated By information for the Contact record.

The process also populates activities for child objects of the objects that meet the preceding criteria.

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Contact

Child Object	Criteria
Activity Type = Appointment	All activities of type Appointment that haven't passed the due date. All activities of type Appointment that have passed a due date 180 days from the current date.
Activity Type = Task	All activities of type Task that have the following status: Not Started, In Progress, and On Hold. All tasks in Completed status that has passed the due date 180 days from current date
Notes	All available notes that were created or updated in the last 180 days.
Audit	Audit log that shows the Created By and Updated By information for the Contact record.

The process also populates activities for child objects of the objects that meet the preceding criteria.

Service Request

Child Object	Criteria
Audit	Audit log that shows the Created By and Updated By information for the service request record.
Messages	All service request messages of the following type: • Customer Entry • Response • Internal Note • Forwards • System Note • System Response
Interactions	Interactions for all SRs where StatusCd = "ORA_SVC_CLOSED" AND ChannelTypeCd IN ["ORA_SVC_CHAT","ORA_SVC_PHONE"]

Note: After this process has completed, you must set the ORA_ZCA_ENABLE_SIGNALS profile option to Yes.

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Where do I find resources for Oracle Fusion Service Analytics?

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

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

What are the Activities setup tasks?

Here's a summary of the steps to set up activities in your environment.

Activities Setup Tasks

Step	Description	Navigation and other details
1	You must create and activate an activities configuration for each object you use. You create an activities configuration by duplicating an existing one. Oracle provides a predefined configuration for each object.To use the predefined configuration, just copy it and activate it. To change what gets displayed in Activities for an object, you can edit your copy before activating it.	**Navigator > Configuration > Configure Activities Display** *How do I create and activate a service request activities configuration?*
2	Make sure the profile option Set the Common CRM Signals Active (ORA_ZCA_ENABLE_SIGNALS) is set to No. This profile is set to the value you want by default, so you might be able to skip this step.	From **Setup and Maintenance**, choose **Service**. Then click the **Tasks** icon and select the **Search** link. Search for **Manage Administrator Profile Values**.

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Step	Description	Navigation and other details
3	Run the Publish Feed Elements process to create the index required by Adaptive Search.	**Navigator > Tools > Scheduled Processes** *How do I run the Publish Feed Elements job to index activities?*
4	After the Publish Feed Elements process completes, set the Common CRM Signals Active (ORA_ZCA_ENABLE_SIGNALS) profile option to Yes.	From **Setup and Maintenance**, choose **Service**. Then click the **Tasks** icon and select the **Search** link. Search for **Manage Administrator Profile Values**.

How do I create a job to read messages?

Now, you create an Oracle Enterprise Scheduler (ESS) job to periodically read the email messages from the configured outlook email address.

This process stores all the required details of an email in your database. After reading the required number of emails in a batch, a new event is generated to create an SR or an SR message using the existing SOA composite.

Here's how you create the new job:

1. From the Navigator, select Tools, then **Scheduled Processes**.
2. Click **Schedule New Process**.

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3. From the Schedule New Process dialog box, click the drop-down list, and then click the **Search** link.

4. On the Search and Select: Name dialog box, enter any part of **Read Messages from External Email Applications** in the **Name** field, and then click **Search**.
5. From the results, select **Read Messages from External Email Applications** and click **OK**, and then click **OK** again.
6. On Process Details page, click **Advanced**, then in the **Advanced Options** area, select **Using a schedule**, then set a time, such as every 1 minute, every 2 minutes, or whatever time increment suits your needs.
7. When you're finished, click **Submit**.

How do I create cases or SRs by interview?

You can have your users create service requests through an interview-style format using Oracle Intelligent Advisor. Using an interview to create service requests, can ensure service requests are created only after all critical questions are answered.

To create service requests by interview, you use Intelligent Advisor to create the interview, then Visual Builder Studio to make the interview available to your users.

> **Note:** This feature requires a license for Oracle Intelligent Advisor.

The steps to enable and use the **Create Service Request by Interview** button on the Service Requests List page.

1. Open the Service Request List page in Visual Builder Studio and find the Constants tab in the Right Hand Panel.
2. Click the **Constants** tab.
3. Set the values for the these variables on the **Constants** tab:
   a. showCreateSRByInterviewButton: true
   b. opaSiteURL: Enter the Intelligent Advisor Hub URL where your interview is deployed.
   c. createSRInterviewDeploymentName: Enter your interview name.
4. Publish the changes.

How do I schedule deletion of inbound emails that were previously retrieved from Exchange Server?

You can set up a scheduled process to automatically delete inbound emails from the inbox on your Microsoft Exchange server if those emails have already been retrieved and processed. This job increases performance if you're integrated with Microsoft Exchange Server, by removing unnecessary processing.

Here's how you do it:

1. In Setup and Maintance, do the following:
   o Offering: Service

   o Functional Area: Commmunication Channels

   o Task: Manage Email Configuration, Registration and Validation
2. In the Configure External Applications section, select the **Delete Message** check box.
   This ESS job, **Delete Messages from External Email Applications**, deletes inbound email from the inbox on Exchange Server, and it will now automatically run according to the schedule set by the administrator.

How do I delete messages from external email applications?

Use the Delete Messages from External Email Applications scheduled process to deletes inbound messages from external email applications.

When to Use

Use this schedule process to delete emails from the Microsoft (MS) Exchange server after they've already been read. Note that this schedule process is only for the Microsoft Exchange server and not for any other external email application.

This schedule process supports integration of the application to the Microsoft Exchange server for the processing of inbound emails. When configured, the Oracle Fusion Application reads inbound emails directly from the MS Exchange inbox. You can configure and run this schedule process to delete emails in the inbox that have already been read to improve performance and keep your inbox clean.

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Note: You ca't manually run this schedule process. You can only enable this option. Perform the following steps to enable this delete:

1. Navigate to Setup and Maintenance work area and

   ○ Offering: Service

   ○ Functional Area: Communications Channels

   ○ Task: Manage Email Configuration, Registration and Validation

2. Select the Delete Message option on the Configure External Applications page.

Privileges Required

Verify that you've the following privilege or role:

Role

- Sales Administrator

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:

   ○ The frequency of this schedule process is decided by the application and isn't configurable .

- Execution Time:

   ○ The execution time depends upon the number of mails to be deleted.

Parameters

None.

Troubleshooting Information

- Administrators will see in the Scheduled Process page if the sync process failed.

- If this sync process doesn't complete successfully, you might see your meetings and Emails from Outlook in the application.

- Verification that the delete process ran successfully can be done by checking if there are no mails in the inbox.

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How do I define data security policies for custom roles?

There are data security policies available for interactions which enable you to do the following:

- Provide self-service users a view of interactions where they're the primary contact.
- Provide service users a view of all service interactions.
- Provide help desk users a view of all help desk interactions.

These policies are available with the predefined duty roles as listed in the following table. You can also add these policies to custom roles.

The following table lists the data security policy Service Interaction Header and its enforcement across predefined duty roles.

Duty Role		Business Object	Condition
Customer Self-Service Usage	Can Manage	Service Interaction Header	For all my interactions
Service Request Administrator	Can Manage	Service Interaction Header	For all CRM interactions
Service Request Channel User	Can Manage	Service Interaction Header	For all CRM interactions
Service Request Contributor	Can Manage	Service Interaction Header	For all CRM interactions
Service Request Power User	Can Manage	Service Interaction Header	For all CRM interactions
Service Request Troubleshooter	Can Manage	Service Interaction Header	For all CRM interactions
Conversation Message Management	Can Manage	Service Interaction Header	For all CRM interactions
Conversation Message Administration	Can Manage	Service Interaction Header	For all CRM interactions
HR Help Desk Administration	Can Manage	Service Interaction Header	For all human resource interactions
HR Help Desk Service Request Management	Can Manage	Service Interaction Header	For all human resource interactions
HR Help Desk Analysis	Can Manage	Service Interaction Header	For all human resource interactions
Internal Service Request Administration	Can Manage	Service Interaction Header	For all human resource interactions
Internal Service Request Analysis	Can Manage	Service Interaction Header	For all human resource interactions
Internal Service Request Management	Can Manage	Service Interaction Header	For all human resource interactions
HR Service Request Analysis	Can Manage	Service Interaction Header	For all Help Desk interactions

Duty Role		Business Object	Condition
HR Service Request Administration	Can Manage	Service Interaction Header	For all Help Desk interactions
HR Service Request Management	Can Manage	Service Interaction Header	For all Help Desk interactions

If you've created a custom job role, you must add one of the Data Security Policies mentioned in the previous table.

Here's how you do it:

1. On the **Roles** tab of the Security Console, search for and select your custom role.
2. In the search results, click the down arrow for the selected role and select **Edit Role**.

   The Edit Role: Basic Information page is displayed.
3. Click the **Data Security Policies** train stop.
4. Click **Create Data Security Policy**.

   The Create Data Security Policy dialog box is displayed. A Start Date value is automatically assigned to the policy but can be changed.
5. In the **Policy Name** field, enter a policy name.

   The names of predefined data security policies begin with the words Grant on.
6. Search for and select the database resource **Service Interaction Header**.
7. In the Data Set field, select **Select by instance set**.
8. Select a Condition Name.
9. In the **Actions** field, select the actions to which this data security policy applies.

   > **Note:** The Manage, Update and Read Actions are required for Chat or Call Center Agents.

10. Click **OK** to save the data security policy.
11. Click the **Summary** train stop.
12. Click **Save and Close** to save the role.
13. Click **OK** to close the confirmation message.

How are SRs deleted and how can I recover an SR that was deleted by mistake?

When work is completed on a service a user marks it Resolved. SRs marked Resolved can still be accessed and edited. After a predefined number of days, a background process sets the SR status to Closed. Closed SRs can't be viewed or updated.

The Purge Deleted Service Requests job permanently deletes closed SRs. You set the number of days until a permanent delete using the SVC_SR_IN_DELETED_DAYS profile option. The job to delete the data permanently is Purge Deleted Service Requests. In addition to service requests it also purges all the associated child records.

Here's an example: say, you set the profile option SVC_SR_IN_DELETED_DAYS to 365 days. When a service request is marked Closed it can't be viewed. But the data isn't permanently deleted by the Purge Deleted Service Requests job for 365 days.

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How do I hide quick actions from the home page?

You can change the Fusion application homepage to hide quick actions from view. Here's an example showing you how to hide the Create Service Request quick action.

Here's how you do it:

1. Sign in to your Fusion application an an administrator and go to **Application Composer**.
2. Click Navigator > Configuration > Sandboxes to create a new sandbox.

   > **Note:** Make sure you select the Structure tool and Application Composer from the All Tools list.

3. When finished, navigate to the **Structure** page (**Navigator > Configuration > Structure**.)
4. Click the node where you want to hide quick actions from, for example **Service**.
5. On the **Edit Group** page, click the **Quick Actions** tab.
6. Expand the **Service Center Quick Links** list.
7. In the Quick Actions list, click **Create Service Request**.
8. On the **Edit Quick Action** dialog box, click the **Visible** drop-down list and select **No**.
9. Click **Save and Close** and then view your home page to verify the result.

How can users access both Sales and Service apps?

When you receive your Oracle Cloud application, access to its functionality and data is secured using a role-based access control security model. In a role-based access control security model, you provide users with roles which are assigned access privileges to protected resources. As long as users have the necessary roles, they can access both applications.

Oracle provides many predefined job and abstract roles as part of the security reference implementation for the sales and service applications.

Sales Roles

Here's some predefined job roles for sales users:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Customer Contract Administrator
- Customer Data Steward
- Customer Relationship Management Application Administrator
- Data Steward Manager
- Enterprise Contract Administrator
- Enterprise Contract Manager
- Incentive Compensation Manager

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- Incentive Compensation Plan Administrator
- Incentive Compensation Analyst
- Inside Sales Manager
- Inside Sales Representative
- Marketing Manager
- Marketing Operations Manager
- Marketing VP
- Master Data Management Application Administrator
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Analyst
- Sales Catalog Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales VP
- Supplier Contract Administrator

You also assign the following abstract roles to sales users who are employees so they can carry out their work:

- Employee
- Resource

If you're using the Incentive Compensation functionality, you can also assign the following abstract roles to users:

- Incentive Compensation Participant
- Incentive Compensation Participant Manager

Service Roles

Many job roles and duty roles are predefined in the Service offering. These are the predefined job roles specific to this product area:

- Chat Agent
- Customer Service Manager
- Customer Service Representative
- Knowledge Analyst
- Knowledge Manager
- Field Service Technician
- Internal Help Desk Administrator
- Internal Help Desk Agent

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- Internal Help Desk Manager
- Case Manager
- Case Worker

Guidance for Assigning Predefined Roles

As a security administrator, you've access to the predefined roles and privileges that are readily available for assignment. However, you must assess the user's need before assigning those roles as is with the complete set of privileges.

Note: Be extremely cautious when assigning predefined roles as-is. "Advisory Note on Subscription Impact" in the *Security Reference for Common Features* guide.

When you assign predefined roles and privileges as is, you're entrusting users with full access to all data and functionality. Such unrestricted access without identifying the business need might pose a security concern. Also, the assigned privileges might account for subscription consumption irrespective of whether you bought the cloud service or not. A detailed list of all the predefined roles that impact subscription is available for reference. See the spreadsheet *Predefined Roles with Subscription Impact*.

If you're aware of a requirement or recommendation to assign specific predefined roles as is, it's fine to do so. For example, only while setting up an application, you might need to assign the predefined Application Implementation Consultant role as is. Once the setup is complete, you can unassign it. Otherwise, the recommended process is to always make a copy of the predefined role, remove the privileges you don't need, and assign only the required privileges. That way, you'll hit the subscription usage in a controlled way, based on your business need.

Note: Updates to Oracle Fusion Applications might also include changes to certain predefined roles. Check the release readiness documents for your product area to know if there are any updates to the predefined roles that are in use. If you find changes that are relevant, incorporate the same changes into your custom role. This will remain an ongoing maintenance activity for the custom roles.

For more information, see the "User and Role-Provisioning Setup Options" and other related topics in the *Securing Applications* guide.

See the *Security Reference for Sales and Fusion Service* guide for a complete list of roles and privileges in Sales and Fusion Service.

How do I add a custom field to the landing page for Adaptive Search?

Use these instructions to add a custom column to the Helpdesk or Fusion Service landing page for Adaptive Search.

Create a Custom Field or Confirm it's Published

1. In your application, click Navigator, then, **Configuration**, and then select **Sandboxes**.
2. Create a new sandbox and make Application Composer active.
3. Open Application Composer.

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4. In the explorer, search for Service Request or Help Desk object based on your need.
5. Expand the selected object and click **Fields**.
6. Create a new custom field, or just make sure the field you want to add is there and published.
   For more information on creating a custom field, see *How do I create a custom field?*

Make the Field Searchable

1. In the Setup and Maintenance work area, make sure Setup: Service is selected.
2. Select the **Productivity Rules** row, then in the task list, select **All Tasks** from the **Show** menu.
3. Click the **Configure Adaptive Search** link.
4. In the explorer, choose **Setup**.
5. Click the **Advanced** tab.
6. Find the object and the field, and select the **Enable** check box.
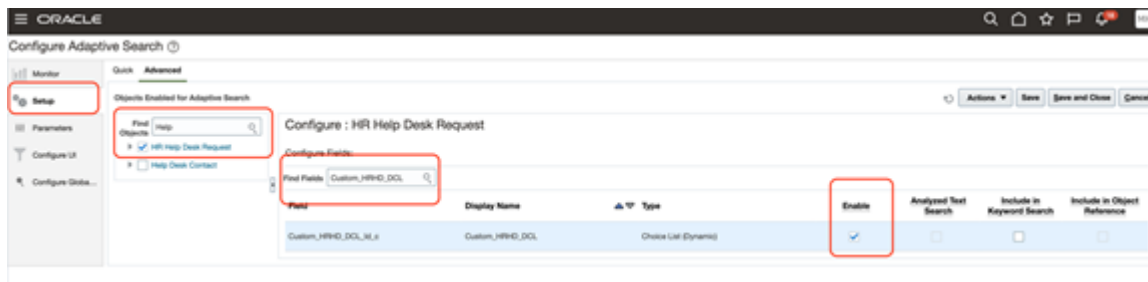
   Now the field will be indexed for adaptive search.
7. Click **Save**.
8. Click the **Actions** drop-down list and select **Full Publish** to retain the change.

Add the Field to the UI

1. On the Configure Adaptive Search work area, click **Configure UI** in the explorer.
2. Find the object you want to add a new column to the landing page
3. Find the field of that object that you want to add.
4. If the **Display in UI** check box is isn't checked for that field, select it to the display the field in the landing page.
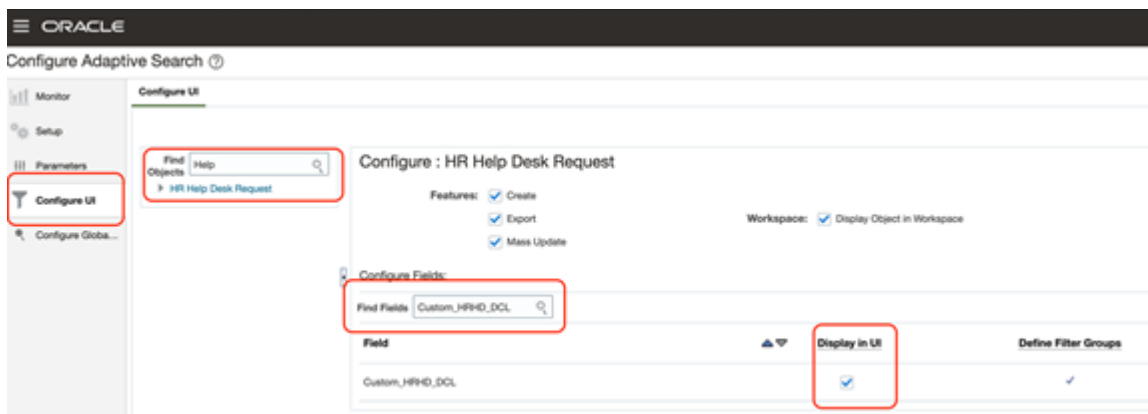
5. Click **Save and Close**.

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Expose the Field in the UI Landing Page

For this example, we'll add the field to the My Open Service Requests area in Service Center.

1. Navigate to Service Center, and in the My Open Service Center page, click the **Actions** menu and select **Manage Columns**.
2. Query for the custom field and select the check box.
3. Drag the field to where you want it to appear on the list page.
4. Click **Save**.

How do I add articles as favorite?

You can implement favorites so that users can bookmark frequently-used articles. Favorites provides users with quick and easy access to the articles they use most often.

> **Note:** This answer is applicable to both Fusion Service Knowledge Management with Redwood and Classic User Experience.

You must have the knowledge manager role, or a similar role that includes the Knowledge Setup and Maintenance privilege to enable favorites.

To enable favorites:

1. Go to **Setup and Maintenance**.
2. Select the **Service** offering and select **Knowledge Management**.
3. Click any of the following:
    - **Manage Knowledge Common Profile Options**
    - **Manage Knowledge Panel Profile Options**
4. Click **CSO_ENABLE_KNOWLEDGE_FAVORITING**.
5. Set the **Profile Value** at Site level to **Yes**.
6. Click **Save and Close**.

Your users can now add articles as their favorite articles.

To add an article as favorite:

1. Navigate to **Knowledge** > **My Knowledge**.
2. Search for the article.
3. In the search results, click the star icon next to the article to add it as favorite.

How do I make the File Import and Export task visible in Navigator?

You can change **Navigator** to expose the Import and Export task by doing the following:

1. Sign in to your application as an administrator.

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2. Click **Navigator > Configuration > Sandboxes**.
3. Create a new sandbox and make sure the **Structure** tool is enabled.
4. Save the new Sandbox.
5. Click **Navigator > Configuration > Structure**.
6. Find File Import and Export in the list, and select it.
7. On the Edit Page Entry workspace, select **Yes** for the following two items:
   - Show in Navigator
   - Show in Springboard
8. Click **Save and Close**.
9. Publish the sandbox, then sign back in and click **Navigator > Tools > File Import and Export** to verify your changes.

How can I restrict certain file formats from being uploaded?

You can use the **Manage Attachment File Formats** setup task in the Setup and Maintenance work area.

Use this task to configure the file formats you want to restrict from being attached. Here's how you access the task:

1. In the Setup and Maintenance work area, click the **All Tasks** icon and click the **Search** link.
2. In the search field, enter **Manage Attachment File Formats**, then click the task link.
3.

Why can't I see any data in my knowledge reporting dashboard?

Sometimes latest data doesn't appear in knowledge reporting dashboards. To make the missing data available in your knowledge reporting dashboards, you need to schedule and run the following knowledge processes:

Schedule Process Name	Description	Impacted Dashboards	Recommended Frequency
Knowledge Article View Aggregation	Use this scheduled process to aggregate data on the number of articles that have been viewed.	Knowledge Management Views	Hourly
Knowledge Search Aggregation	Use this scheduled process to aggregate data on the number of knowledge base searches that users have performed.	Knowledge Question Analysis	Hourly
Knowledge Workflow Aggregation	Use this scheduled process to aggregate data on the use of workflow, such as how long articles spend on each workflow step.	Article Workflow Dashboard	Hourly

Schedule Process Name	Description	Impacted Dashboards	Recommended Frequency
	Schedule this job only if you're using knowledge workflow.		
Refresh Service Categories for Reporting	Use this scheduled process to make category names available in your knowledge reports. If you create a report from the "Knowledge Management - Article Category Real Time" subject area or use one of the dashboards listed here and find that there are no results, then you need to run this scheduled process.	All Knowledge Breakdown, Knowledge Management Views	Daily

To schedule a knowledge process:

1. Go to **Tools**, and click **Scheduled Processes**.
2. Click **Schedule New Process**.
3. In the Schedule New Process dialog box, select **Job** as the process type.
4. In the **Name** field, enter one of the following required jobs, and click **OK**.
   - Knowledge Article View Aggregation
   - Knowledge Search Aggregation
   - Knowledge Workflow Aggregation
   - Refresh Service Categories for Reporting
5. Click **Process Options**, choose the options you want, and click **OK** to return to the Process Details page.
6. Click **Advanced** and for **Run** select **Using a schedule**.
   - For the Knowledge Article View Aggregation, set the following:
     - **Frequency**: Hourly/Minute
     - **Time Between Runs**: Hours 1 Minutes 0
     - **Start Date**
     - **End Date**
   - For the Knowledge Search Aggregation, set the following:
     - **Frequency**: Hourly/Minute
     - **Time Between Runs**: Hours 1 Minutes 0
     - **Start Date**
     - **End Date**
   - For the Knowledge Workflow Aggregation, set the following:
     - **Frequency**: Hourly/Minute
     - **Time Between Runs**: Hours 1 Minutes 0
     - **Start Date**
     - **End Date**
   - For the Refresh Service Categories for Reporting, set the following:
     - **Frequency**: Daily
     - **Days Between Runs**: 1
     - **Start Date**
     - **End Date**
7. Click **Submit**.

Why are there random breaks in auto-generated SR number sequences?

At times you might notice random breaks in the auto-generated SR number sequence. For instance, SR numbers has jumped from 3012 directly to 4010, with no SR numbers between.

The SR sequence is maintained by the database sequence. The database sequence uses cache space to reserve the values for sequential numbers. The default size for the cache is 1000 for best performance. So the first 1000 numbers are booked for the sequence when the database starts and all new SRs are assigned with sequential numbering, such as 1 to 1000. When the database refresh happens, the cache is cleared and the next 1000 numbers are reserved. So, if the previous 1000 number allocation hasn't been completely used, say it stopped at number 987, after the refresh, the SR numbers will nonetheless begin at number 1001.

How do I set up Fusion Knowledge Management in the Redwood User Experience?

You can use the following high-level steps to implement Fusion Knowledge Management in Redwood User Experience.

- Enable Knowledge Management in Redwood User Experience
    - Get your Cloud Account Details from the Welcome Email
    - Enter the Promotion Code
    - Enable Knowledge with Redwood User Interface Feature
    - Create a Setup User

- Implement Knowledge Management
    - Create User Groups
    - Create Additional Custom Content Types
    - Create a Knowledge Author User
    - Create a Customer Service Representative
    - Assign Locales to Users
    - Schedule Required Knowledge Processes

- Verify implementation
    - Verify Your Knowledge Implementation Setup as an Author
    - Verify your Knowledge Implementation Setup as a Customer Service Representative

This flowchart illustrates these implementation steps and provides information on the related roles and UIs.

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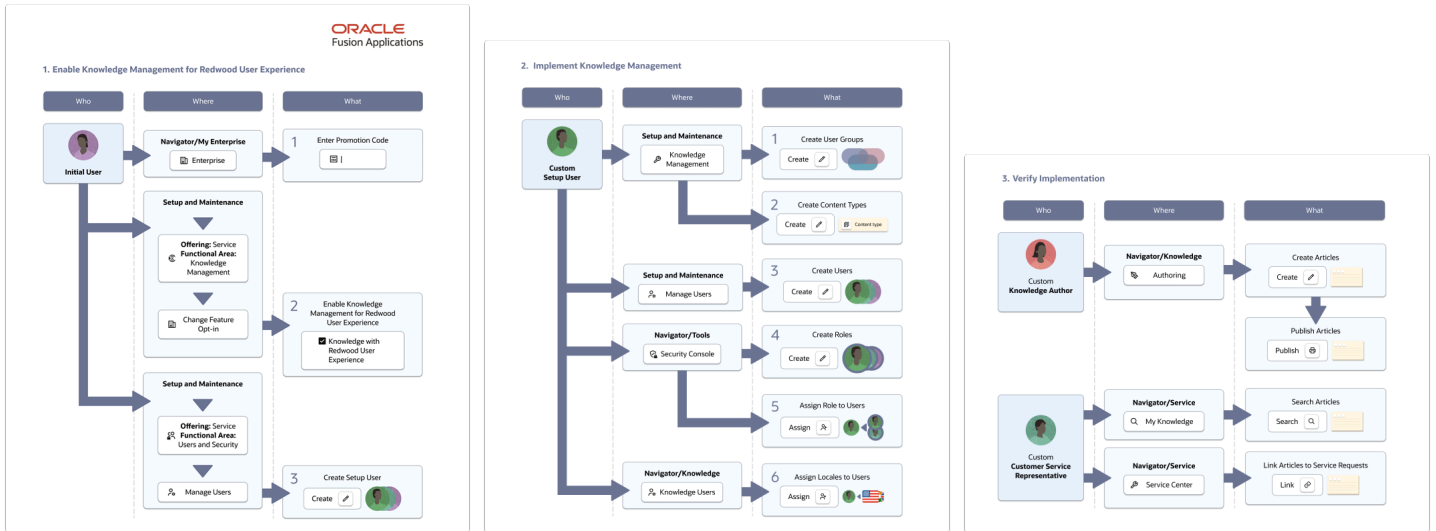
For more information on setting up Knowledge Management, refer to the *How do I get started with Fusion Knowledge Management in the Redwood User Experience?* playbook.

How do I update multiple service request records at the same time?

You can select more than one record from the service request list page and update them at the same time. For example, you might want to change the owner of multiple records or update the severity field value on all selected service request records at once. You can also select more than one record and perform the same action at the same time. For example, you can select more than one record and select the Delete action which will delete those selected records. The Delete action will only appear for those users who have the System Administration privilege.

How can I embed a video in a knowledge article?

As an author, you can embed videos in an article in Knowledge Authoring.

To embed a video in Fusion Service Knowledge Management with Redwood User Experience:

1. Navigate to **Knowledge** > **Authoring**.
2. Search and click the article you want to edit.
3. Click **Edit**.
4. Copy and paste the URL of the video in the rich text area where you want to embed the video.

   You can see the video embedded in the article.
5. Click **Save**.

To embed a video in Fusion Service Knowledge Management with Classic User Experience:

1. Navigate to **Knowledge** > **Authoring Classic**.
2. Search and click the article you want to edit.

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3. From the **Action** menu, click **Edit**.
4. Click in the rich text area where you want to embed the video, and click the "Enable source editing" icon.
5. Copy the code for the video. For example, to get the code for embedding a YouTube video:
    a. Open the video in YouTube.
    b. Click **Share**.
    c. Click **Embed**.
    d. Copy the iframe code.
6. Paste the code for the video in the rich text area where you want to embed the video.
7. Click **Save**.

Why can't I start a workflow to review a knowledge article?

To be able to submit a knowledge article for review, your administrator must create and enable workflows for Knowledge:

- *Enable Workflow Task Approval*
- *Create a Workflow*
- *Set up User Privileges for Workflows*

For more information, see the *Workflow* video on Oracle Video Hub.

Enable Workflow Task Approval

To enable workflow task approval:

1. Log in as an administrator.
2. Select **Setup and Maintenance**.
3. Click the Tasks tab, and then click **Search**.
4. Search for and click **Manage Activity Standard Lookups**.
5. Click **ZMM_ACTIVITY_OUTCOME**.
6. In the text box above the Lookup Code column, type ORA_KM and press the Enter key.
7. Select the **Enabled** check box for:
    ○ ORA_KM_APPROVED
    ○ ORA_KM_REJECTED
8. Click **Save and Close**.
9. Click **Done**.

Create a Workflow

Before you create a workflow, you must plan your workflow in advance by considering all the possible steps in the publishing lifecycle. You may also want to review any existing workflows to determine if there are any workflows that already meet your requirements.

Use the following procedure to create a workflow:

1. In the Setup and Maintenance work area, go to the **Manage Knowledge Workflows** task:

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- o Offering: Service or Help Desk
- o Functional Area: Knowledge Management
- o Task: Manage Knowledge Workflows

2. In the Workflows page, click **Create**.
3. Specify the following information:
   a. **Workflow Name**: The name of the workflow process.
   b. **Publish articles automatically when complete?**: Disable this option if you want articles to be published manually when the workflow completes. By default, this option is enabled, and articles are published automatically after the workflow completes.
4. Complete the following procedure to add steps to the workflow:
   a. Click **+Step**.
   b. In the Add Step page, specify the following details:
      - **Step Name**: The name of the workflow step. This name appears as a task to the users in the Knowledge Tasks page.
      - **Reference Key**: A text string used as internal identifier for this step. Make a note of the reference key which will be used to create a data security policy for this step.
      - **Duration**: The number of days for the user to complete this step. If used, this causes the workflow task to have a due date.

        If the due date has elapsed then the task is considered overdue. Even though the task is overdue, the user can still complete the task. The task is not automatically approved.
      - **Allow editing in step?**: Disable this option if you don't want any user to edit the article during this step in the workflow.
      - **Only assigned users can approve?**: Indicates whether a user must be assigned to approve this step.

        By default, this option isn't enabled, which means any user (with privileges to view the article in authoring and approve the workflow step) can approve the step.
   c. Click **Create**.
5. Repeat step 4, if you want to add more steps to the workflow.
6. Click **+Content Type**, and select the content types to which you want to associate this workflow, and then click **Add**.

   Note: Only articles of this content type will go through this workflow.

7. Click **Save**.

Set up User Privileges for Workflows

Workflows typically involve users of two types:

- Users who perform the steps in a workflow
- Users who assign tasks to other users in addition to performing tasks

Users such as Knowledge Managers, who assign tasks to other users, require special privileges to assign tasks.

Here are some key points you should know about privileges for workflows:

- You must determine the workflow steps for which you need users with special privileges.
- You must make a note of the reference keys for the workflow steps.

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- To assign the special privileges to a user, you must add a data security policy to the user's existing knowledge authoring role. Note that this is in addition to the existing knowledge authoring privileges. Just having approval privileges does not give the user access to the authoring UI or access to view the articles that need approval.

You must create a data security policy for each workflow step. For example, if your workflow has a step named "SME Review", you must perform the following steps:

1. Make a note of the reference key for the step.
2. Go to **Tools**, and click **Security Console**.
3. On the **Roles** page, search and select the role to which you want to assign workflow privileges.
4. From the actions menu, click **Edit Role**.
5. Click **Data Security Policies**.
6. In the Data Security Policies page, click **+ Create Data Security Policy**.
7. Enter the following information:

   - **Policy Name**: Name of the data security policy. For example, SME Review Step.
   - **Data Resource**: Knowledge Workflow Steps
   - **Data Set**: Select by key
   - **REFERENCE_KEY**: Reference key of the workflow step that you made note of. For example: SME_REVIEW.
   - Actions: Select Approve or reject a Knowledge Workflow Step

8. Click **OK**.
9. If the user who is doing the SME Review should be able to assign the task to other users, complete the following configuration. Else, skip this step.

   a. Click **Function Security Policies**.
   b. In the Function Security Policies page, click **+Add Function Security Policy**.
   c. Search and select **Manage Knowledge Tasks**, which has CSO_MANAGE_TASKS_PRIV as its code.
   d. Click **Add Privilege to Role**.
   e. Search and select **Knowledge User Management**, which has CSO_KNOWLEDGE_USER_MANAGEMENT_PRIV as its code. This privilege allows the assigner to view and select the users to whom they will assign the task.
   f. Click **Add Privilege to Role**.

10. Click **Summary**.
11. Click **Save and Close**.

Why can't I add attachments to a knowledge article as an author?

You may not be able to attach files to an article in Knowledge Authoring because either attachments are not allowed for the article content type or the file type is not allowed or your file exceeds the file size limit.

An article can have up to 20 attachments with a maximum file size of 100 MB.

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Enable File Attachments

If you don't see the option to attach files to an article in Knowledge Authoring, you need to request your administrator to enable file attachments for the content type of the article.

To enable file attachments:

1. Log in as an administrator.
2. Select **Setup and Maintenance**.
3. From the **Setup** menu, select the **Service** offering.
4. Select the **Knowledge Management** functional area and click **Manage Knowledge Content Types**.
5. Click the name of the content type you want to be able to attach files to.
6. Click **Content Schema**.
7. Select the **Enable File Attachments** check box to allow authors to attach files to articles of this content type.
8. Click **Save**.

Manage File Attachment Types

File types such as office documents (.doc, .docx, .odt), PDF (.pdf), and video (.mp4) are the supported file extensions for attachments by default.

You need to request your administrator if you want to attach additional file types.

To enable additional file types as attachments:

1. Log in as an administrator.
2. Select **Setup and Maintenance**.
3. From the **Setup** menu, select the **Service** offering.
4. Select the **Knowledge Management** functional area and click **Manage Knowledge Files and Images**.
5. In the **File Extensions Allowed** text box, add the file extension you want to allow.
6. Click **Save**.

Why can't I find users in the Knowledge Users UI?

If you are unable to search for a user in the Knowledge Users UI, ensure that you have:

- Created the user with the required Knowledge role. For more information, see *What are the predefined knowledge roles?*.

- Added the Resource role to the knowledge user.

For an example on how to create a knowledge user, refer to the *Create a Knowledge Author User* topic in the "How do I get started with Fusion Knowledge Management in the Redwood User Experience?" playbook.

What's the maximum attachment size?

The profile option FND_FILE_UPLOAD_MAX_SIZE defines the maximum attachment size for Fusion Service.

By default the profile option is set to 2 GB at site level. We recommend, in the interest of performance, that you upload smaller attachments.

Operating system and browser notification settings

You can configure your Fusion Service application to trigger desktop notifications to appear when new phone calls or chats are delivered to agents. This is useful in that it sends alerts to agents who aren't actively working within Fusion Service.

By selecting your notifications, you bring the Fusion Service page into focus where an agent can accept a call or a chat.

After enabling your notifications using the Omnichannel profile options, you might need to change your operating system or browser settings if your notifications aren't working as expected.

Enable Windows System notifications

1. In Windows, find the **Settings > System > Notifications** setting and make sure it's set to **On**.
2. Expand the setting and check the remaining settings to enable them.

Enable Windows System notifications for your browser

1. In Windows, find the **Settings > System > Notifications** setting and make sure it's set to **On**.
2. Select your browser.

   For this example, we'll use Chrome.
3. Enable Notifications by turning the toggle to **On**
4. Make sure all other notification types are also enabled.

Enable notifications in your browser

1. In Chrome, navigate to **Settings > Privacy and security**.
2. Find the Notifications setting and select **Allow** from the drop-down list.
3. Find the Sound setting and select **Allow** from the drop-down list.

Turn off Focus Assistant

Note: This setting applies to Windows 10 only.

1. Navigate to **Settings > System > Focus assist** and select **Off**.

Reboot your computer

Now just reboot your computer to use the new settings.

Troubleshooting

- If you're not seeing notifications in the Notification Center, note that Windows System Notifications aren't supported in Chrome Incognito windows.

- If you're not seeing the notification banner:
    - Make sure you're in the latest version of Chrome.
    - Check *Microsoft Help* for more information.

- If you're using Windows 10, note that Windows 10 can't display notification banners from an app if that app isn't allowed to run in the background. Here's how you can check if you're using the correct settings:
    - Click **Start > Settings > Privacy**.
    - Select Background apps.
    - Make sure the **Let apps run in the background** setting is enabled.
    - In the **Choose which apps run in the background** setting, make sure Chrome is set to **On**.

How do I purge Service activities?

In Service Center, the Activities panel and page on each record track and display a broad range of activities.

Activities tracked include email exchanges, internal notes, conversations, call logs, past and future tasks, and appointments, along with recent updates to the record itself. The application tracks these activities on service requests, accounts, opportunities, contacts, and leads.

For more information, see *How You Enable and Display Activities*.

How are activities purged?

The Activities Purge job eliminates activity records that are no longer pertinent to daily operations. This prevents the elastic index from being cluttered with unnecessary information.

The relevance of these activities is decided by rules set by individual object teams. The purge process specifically targets activity entries that were generated when users interacted with records, such as making field-level changes or creating or updating internal notes, tasks, or appointments. It doesn't affect the actual parent or child object records, only the entries in the activity stream that meet the defined purge criteria are removed.

Note: When the parent object record is deleted, the process automatically purges all the corresponding activities. The activities that are removed by the job can't be retrieved.

When do purges happen?

Purging of activities is executed through an automatically scheduled Oracle Enterprise Scheduler (ESS) job. The job is executed once in every 7 days

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What's the default purge criteria for Activities of parent records?

All the activities of parent records and the corresponding child records that meet the following criteria will be purged.

> **Note:** Individual criteria can be provided for a child or related object for a specific object if needed

Default purge criteria

Object	Default Criteria
Service Request	All Service Requests where STATUS IN (CLOSED or RESOLVED) AND LAST UPDATED DATE is greater than or equal to five years.

What's the default purge criteria for Activities of Service child records

The following tables shows the default criteria used for the purge of related and child objects for Activity (Tasks and Appointments), Messages, and Interactions for the Service Request object.

> **Note:** Individual criteria can be provided for a Child or Related object for a specific object if needed.

Default purge criteria for Activities of Service child records

Parent Object	Child Object	Requirements
Service Request	Activity Type = Appointment	All activities of ACTIVITY TYPE IN (APPOINTMENT) AND END DATE that are greater than or equal to five years.
	Activity Type = Task	All activities of ACTIVITY TYPE IN (TASK) AND STATUS IN (CANCELED; CLOSED) AND DUE DATE are greater than or equal to five years.
	Audit Log	Not purged.
	Conversation Message	All Conversation messages where LAST UPDATED DATE is greater than or equal to five years.
	Interactions	All Interactions where LAST UPDATED DATE is greater than or equal to five years.
	Wrapups	All Wrap-ups of the interactions will be purged

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Parent Object	Child Object	Requirements
	Action Plan Action	All Action Plan Action where LAST UPDATED DATE is greater than or equal to five years and STATUS IN COMPLETED.
	Action Plan	All Action Plan where LAST UPDATED DATE is greater than or equal to five years and STATUS IN COMPLETED.
	Messages	All Messages where LAST UPDATED DATE is greater than or equal to five years.
	Milestones	All Milestones where LAST UPDATED DATE AND STATUS IN (COMPLETED).
	Object Link (SR}	All Object Link (SR) where LAST UPDATED DATE is greater than or equal to five years.

What's the default purge criteria for Activities of Sales child records

The following tables shows the default criteria used for the purge of related and child objects for Activities (Tasks and Appointments), Notes, Audit Records for all the top sales objects which are Account, Contact, Lead, and Opportunity.

Note: Individual criteria can be given for a child or related object for a specific object if needed.

Default purge criteria for Activities of Sales child records

Parents Object	Child Object	Requirements
All Sales Objects: • Accounts • Contacts • Leads • Opportunities	Activity Type = Appointment	All activities of ACTIVITY TYPE IN (APPOINTMENT) AND END DATEis greater than or equal to three years.
	Activity Type = Task	All activities of ACTIVITY TYPE IN (TASK) AND STATUS IN (CANCELLED; NOT STARTED; IN PROGRESS ; ON HOLD) AND DUE DATE is greater than or equal to three years.
	Notes	All Notes where the Last Updated Date is greater than or equal to three years.
	Audit Log	Not purged.

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Why can't I edit my articles in source mode as a knowledge author?

As a knowledge author, if you are not able to view the "Enable source editing" icon while updating an article, you need to request your administrator to assign you the necessary privileges to access source editing.

As an administrator, to enable source editing:

- For Fusion Service Knowledge Management with Classic User Experience:
    - Source editing is available by default for all authors in Authoring Classic till release 24B.
    - From release 24C, you need to assign the CSO_KNOWLEDGE_ACCESS_SOURCE_MODE functional privilege to one of the user's roles.
- For Fusion Service Knowledge Management with Redwood User Experience:
    - You need to assign the CSO_KNOWLEDGE_ACCESS_SOURCE_MODE functional privilege to one of the user's roles.
    - Ensure that the Source icon is not hidden:
        i. Select **Setup and Maintenance**.
        ii. From the Setup menu, select the **Service** offering.
        iii. Select the **Knowledge Management** functional area and click **Manage Knowledge Authoring Rich Text Editor**.
        iv. Select the required department.
        v. Select the check box for the Source icon.
        vi. Click **Save**.
        vii. Click **Done**.

How do I collect Service Center Chat client logs?

Service Center communicates with the Chat Server through a Shared Worker.

To enable the Shared Worker, you need to configure the Chrome browser. The Chat Shared Worker is created when the Chat Agent opens a Service Center page. You do this configuration in Chrome's Developer Tools. You'll need the following information to do the tasks in this topic.

- Network logs for the application.
- Network logs for the chat shared worker.
- Browser console logs for the application.
- Browser console logs for the chat shared worker.

Prerequisites

After navigating to the Service Center, but before you make yourself available for chat,, do the following:

1. Click the **Menu** icon (also known as the More) icon.

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2. From the drop-down list, choose **More Tools**, then **Developer Tools**.
3. If Developer Tools appears as a new window minimize it. If it appears at the bottom of the application browser tab, then follow these steps to detach it.

    a. Click the Menu icon and select the **Dock side** value as to be **Undock to separate window**, as shown in the following example:
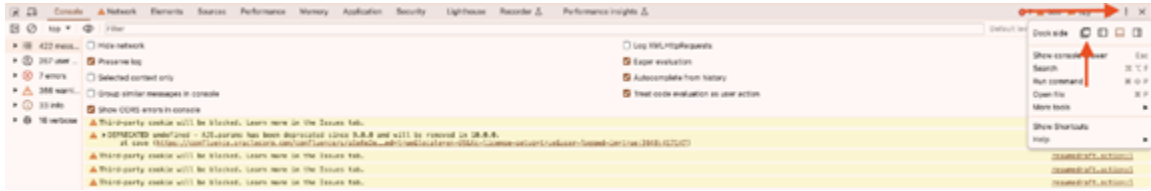
    b. Minimize the window.

Launch Chrome Developer Tools for the Chat Shared Worker

After navigating to the Service Center, but before you make yourself available for chat,, do the following:

1. Open a new browser window and enter the following:

   `chrome://inspect#workers`

2. If your agent is configured and enabled for Chat you'll see the `ChatSharedWorker` as shown in the following example:
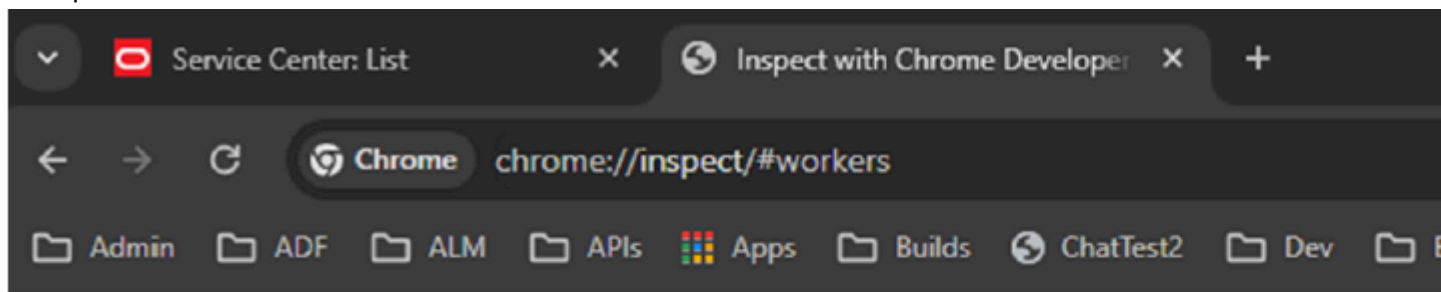
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3. For the `ChatSharedWorker` entry, click the **inspect** link.

   A new Chrome Developer Tools window appears and looks something like the following example:

4. Minimize the window.

   Now you'll collect the log files.

Capture the network HAR file for the shared worker

After reproducing your test cas, you'll save the Chat Shared Worker Network logs by doing the following:

1. In the ChatSharedWorker Developer Tools window, select the Network tab.
2. Click the Down arrow to Export HAR as shown in the following example:
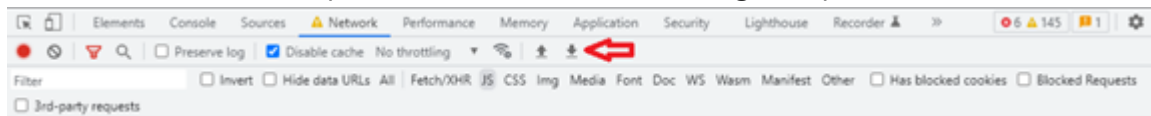
3. Name the file something like: `ChatSW_<issue>.har`. For example, `ChatSW_timeout.har`.

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Capture the logs for Sharedworker

After reproducing your test case, save the Chat Shared Worker console logs.

1. In the ChatSharedWorker Developer Tools window, select the Console tab as shown in the following example:
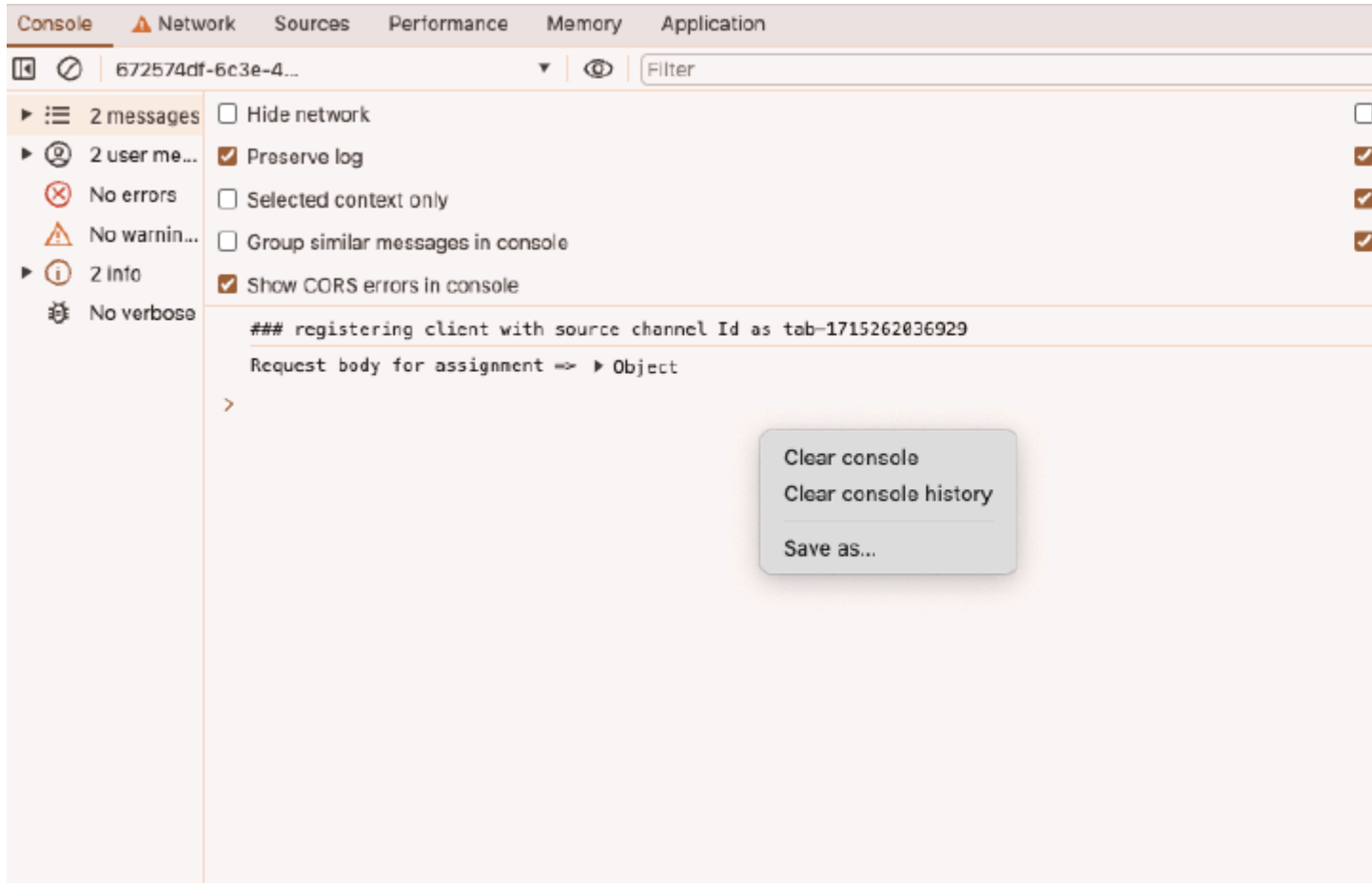
2. Right-click the record and choose **Save as**.
3. Name the file something like: `ChatSW_<issue>.log`. For example, `ChatSW_timeout.log`.

Capture the Application Window Network HAR file

After reproducing your test case, save the application Network logs.

1. In the Developer Tools window, select the **Network** tab.

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2. Click the Down Arrow to Export the HAR file as shown in the following example:
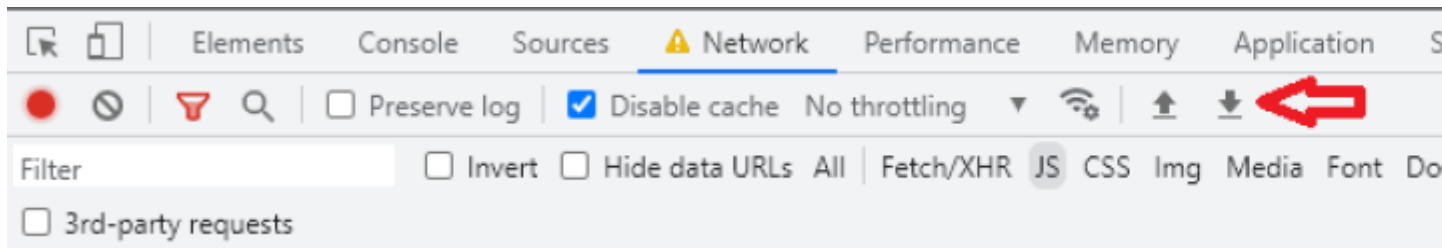
3. Name the file something like: `file app_<issue>.har`. For example, `app_timeout.har`.

Capture the Application Window logs

After reproducing your test case, save the application Developer Tools Console logs.

1. In the Application Developer Tools window, select the **Console** tab.

2. Right-click the record and choose **Save as**.
3. Name the file something like: `app_<issue>.log`. For example, `app_timeout.log`.

How do I color code the Service Request Severity field?

You can color code the Severity field in Service request records by enabling a profile option.

Here's how you do it:

1. In Setup and Maintenance, click the **Tasks** icon.
2. In the Search Tasks field, enter **Manage Service Request Severities**.
3. On the Service Request Severities page, configure your severity values, and create more if needed, set the color for each, and then click **Save and Close**.

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Does searching for knowledge articles also include article content?

When searching knowledge, it searches the entire article, which includes article title, article body, and its attachments.

For attachments, it matches the search terms in the attachment file name. If it's a text attachment, it also searches the content of the attachment.

Only article titles will be searched if you're using the auto-complete feature while searching. For example, while searching in My Knowledge with the Redwood User Experience with auto-complete, it searches only the article titles.

> **Tip:** Use meaningful titles for your articles. This helps users to easily differentiate between the articles returned in the search results.

In what order do service requests appear on the list page with no filters applied?

SRs with the latest updates appear at the start of the list. SRs with agents assignments take priority over SRs without assignments.

Why can't I suggest improvements to knowledge articles from the Knowledge application?

You need the Create Knowledge Tasks privilege having CSO_KNOWLEDGE_CREATE_TASK_PRIV as its code, to be able to view the Suggest a Change option, which allows you to provide feedback suggestions to improve knowledge articles from My Knowledge, Redwood Service Center, My Help, and Redwood Help Desk.

> **Note:** This answer is applicable to Fusion Service Knowledge Management with Redwood User Experience, release 24C and higher.

An administrator can enable the **Suggest a Change** option for a user in one of the following ways:

- By adding the **Create Knowledge Tasks** privilege to one of the custom roles assigned to the user, and then running the following scheduled processes in the order given below:
    - Send Pending LDAP Request
    - Retrieve Latest LDAP Changes
    - Import User and Role Application Security Data

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- By assigning one of the predefined roles, which has the **Create Knowledge Tasks** privilege, to the user. For example:
  - Knowledge Manager
  - Service Request Administrator
  - Service Request Troubleshooter
  - Customer Self Service Usage

  For more information on the list of predefined roles, see the Security Reference guide for your product on *Oracle Help Center*.

How do I configure search for other attributes on the Contact Search page?

This topic applies only to Fusion Service with the Classic User Experience.

In the Classic User Experience Add Contact page, when searching for potential contacts to add to a service request record, the default filter used to search is based on what's in the Account field. To add more fields, such as a custom field, you can configure the Add Contact dialog box to display the custom or other default fields.

> **Note:** For this example, we'll look at adding a custom field, but the procedure is the same for ready to use fields.

1. Sign in to Fusion Service as a user who can create a new sandbox.
2. In Application Composer, expand the **Standard Objects** node, then expand the **Contact** object.
3. Click **Pages**.
4. In the **Reusable Regions** area of the Applications tab, click the **Actions** drop-down list and select **Duplicate**.
5. In the Duplicate Layout dialog box, enter a name in the **New Layout Name** field and then click **Save and Edit**.
6. In the **Edit Search and Search Dialog Layout** page, click the **Search Region** click the **Edit** (pencil) icon.
7. From the **Available Fields** list, find the custom field you want available for search, then use the arrow to move the field to the **Selected Fields** area.
8. Click **Save and Close**.
9. In the navigator, expand the **Service Request** object, and click **Pages**.
10. In the **Details Page Layouts** area, duplicate the Standard layout, give it a new name, then click **Save and Edit**.

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11. In the Details Layout page, click the Contact subtab icon, as shown:
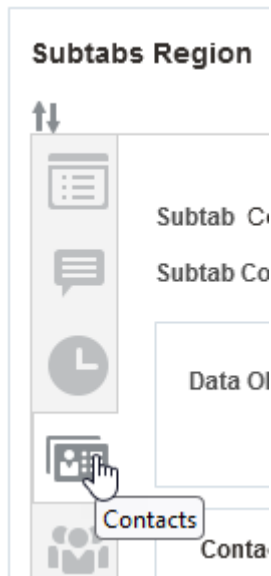
12. Click the Subtab: Contact Edit icon (pencil) as shown:
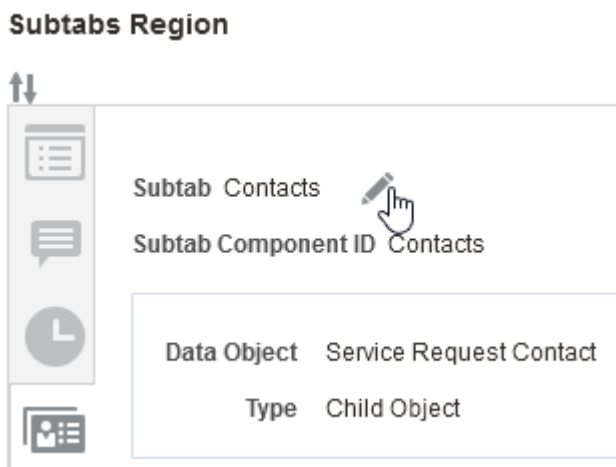
13. On the Subtab layout page, click the Edit icon in the **Configure Summary Table: Buttons and Actions** area, click the Edit icon (pencil).

14. In the **Configure Default Values for Search and Select Dialog** page, make sure you see the new contact page and the custom field. You can change any of the fields to have a default value, including the custom field.

15. Click **OK**, then exit Application Composer.

16. Now, to verify that the default value of your custom field is reflected in the UI, do the following:

    a. In Fusion Service with the Classic UI, open a Service Request for editing.

    b. Click the **Contacts** subtab, and then click **Add Contacts**.

    c. Verify that the **Add Contacts** dialog shows the custom field with the default value that was configured.

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How do I change the default subject line in a service request?

By default, if an agent doesn't include a subject title in a new service request, the first few characters of the SR message is used as the subject. You can change this to default to the SR title by doing the following:

1. In your Fusion application, from the employee edit details page, select **Edit Page in Visual Builder Studio**.
2. In VB Studio, navigate to the variables section of the service-request-details-start page.
3. Add an event listener with the action: `transientInternalServiceRequest.`
4. Navigate to that action chain, then add a condition to verify whether the `defaultMessageComposeSubject` variable is set.
5. If the variable isn't set, assign the `defaultMessageComposeSubject` value with `srnumber.`

What are scheduled processes?

Scheduled processes do tasks that are too complex or time-consuming to do manually, for example importing data or updating many records. You can run scheduled processes on a recurring schedule and send notifications based on how the process ends.

Some scheduled processes give you printable output. Those processes might have **Report** in their name.

Use the Scheduled Processes work area to run all the processes you've access to and to manage submissions. If you need access to this work area, ask your security administrator to assign you a role that gives you access, for example a custom role with the the Manage Scheduled Processes (FND_MANAGE_SCHEDULED_PROCESSES_PRIV) privilege. Other than the Scheduled Processes work area, you might be also able to run certain processes from other work areas.

Jobs and Job Definitions

Each scheduled process that you run is based on a job. The job is the executable that controls what the process does. Each job needs a job definition, which, for example, identifies the parameters and other options you've set for the process. You or your administrator can create job definitions for Oracle Analytics Publisher reports so that users can run the reports as scheduled processes.

Process Sets

A process set is a scheduled process that contains multiple processes or even other process sets. So, when you submit a process set, you're running more than process.

> **Note:** When you submit certain scheduled processes, the job logic causes other processes to automatically run. But in this case, you're not submitting a process set that includes those other processes.

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Submission

When you submit a scheduled process, you can use its parameters to control how, and which records are processed. For example, a process includes only the transactions that were edited by the person you select for a Last Updated By parameter. Some scheduled processes don't have parameters.

As part of the submission, you can also set up a schedule for the process, for example to run once a week for two months. Every time a process runs, there's a unique process ID.

Output

Some scheduled processes provide output in PDF, HTML, and other formats. For example, a process can import records and also produce output with details about those records. There are many types of output, for example a tax document or a list of transactions.

How do I modify lookups?

Administrators can modify lookups for service requests . Optionally, you can map status values to status types. By default, the following five Status types exist for service requests:

- New
- In Progress
- Waiting
- Resolved
- Closed

A service request always has one of these status types. However, administrators might want to display different labels for status types or change the display sequence. For example, this might be useful in situations where you want to distinguish between statues such as "In Progress - Troubleshooting" versus "In Progress - Repairing." This procedure maps one or more Statuses to status types.

The following tasks are used to modify the service request lookups:

- Manage Service Request Internal Priorities
- Manage Service Request Sources
- Manage Service Request Resolutions
- Manage Service Request Outcomes and Resolutions
- Manage Service Request Severities
- Manage Service Request Channel Types
- Manage Service Request Channel Type Visibility
- Manage Service Request Problem Types
- Manage Service Request Contact Relationship Types
- Manage Service Request Status Values
- Manage Service Request Profile Options
- Manage Service Request Categories

- Manage Service Request Knowledge Profile Options
- Manage Service Request Parts Order Disposition Options

To modify lookups:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Service Request
   - Task: Select all tasks and click the task you want to modify.
2. In **Lookup Codes**, click the lookup code that you want to modify.
3. Modify the fields to correspond to your needs.
4. Click **Save and Close**.
5. Repeat the procedure for all of the service request lookup tasks.

The service request lookup is modified.

Related Topics
- How do I update existing setup data?

How do I define a catalog for Service?

In most implementations, you must create a catalog of products and services. If you've already defined a catalog with the Base usage for Sales, it can be used in the Service offering.

You also have the option to create and manage a distinct catalog for the Service offering.

Before deciding whether to create a distinct catalog for the Service offering, consider that using the same catalog as Sales means you've the same hierarchy of product groups used to categorize service requests. For some implementations, you can use the same catalogs. However, in other implementations, the Sales catalog might not have the correct granularity to categorize service issues. In these situations it would be appropriate to create a separate hierarchy of product groups and products, specifically for the Service offering.

Using an Existing Sales Catalog for the Service Offering

To use the same catalog for your Service offering that you use for your Sales implementation, you must add the root product group for the Sales catalog in the Service offering.

To use an existing Sales catalog in your Service offering:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Service Catalog
   - Task: Manage Product Group Usage

   The Manage Product Group Usage page appears.
2. Click the **Service** usage.
3. In the **Service: Details** section, on the **Product Groups** tab, add the root product group for the sales catalog.
4. Save the record.

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Defining a Distinct Catalog for the Service Offering

Defining a catalog for the Service offering is the same procedure that you use for Sales. The only difference is that for Product Group Usage, Sales uses the Base usage, whereas Service uses the Service usage.

To define a distinct catalog for the Service offering:

1. Define a product catalog specific to Service.
2. In the **Manage Product Group Usage** page, click the **Service** usage.
3. Associate the product catalog that you created to the Service usage, as described in the previous section.

How are inbound messages processed?

An inbound message is created when you receive an incoming service email from a customer or a partner. This flowchart describes the process flow for an incoming customer email:

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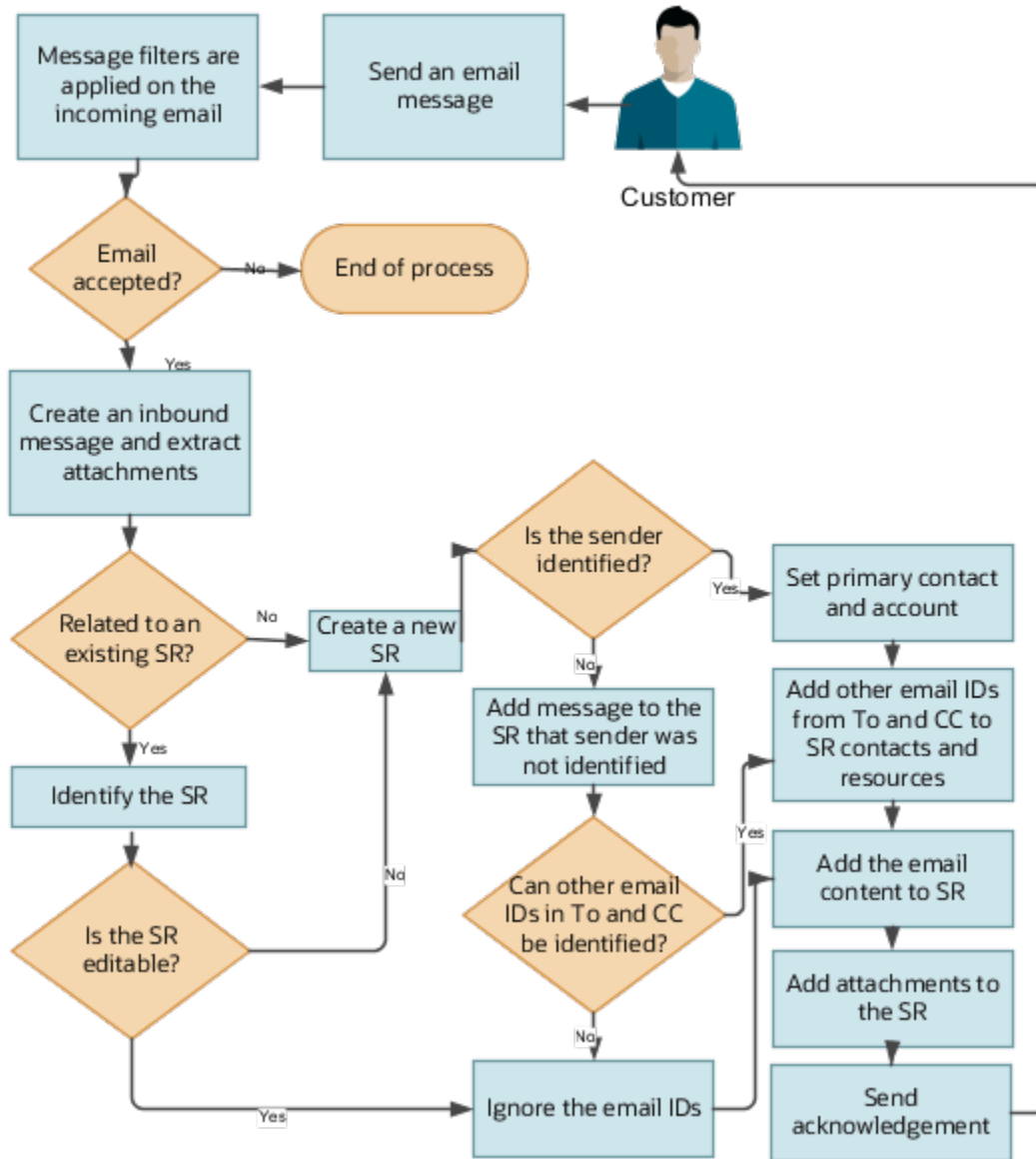
1. A customer or a partner sends an email requesting support.
2. If an inbound message filter exists, then the filter is applied to the incoming message.
3. If the message is accepted, then an inbound message is created, and any associated attachments are extracted.
4. The message is verified to see if it's related to an existing Service Request (SR).

   o If the inbound message is related to an existing SR:

   The related SR is identified. If the related SR can be edited, then the email content and attachments are added to the SR. If the original SR can't be edited, then a new SR is created.

   o If the inbound message isn't related to an existing SR, then a new SR is created.

5. The email ID of the sender is validated against the customer or partner records in the database.

   o If the email ID of the sender exists in the records, then the primary contact and the account are updated on the SR.

   o If the From email ID doesn't exist in the database, then a message is added to the SR that the sender can't be identified.

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- If an SR is created with no contact or account populated.
- If more than one contact with the same email ID exists in the database, then the following scenarios are possible:

Scenario	Primary Contact in the SR	Acknowledgment Sent
Sender's email address matches the email address of 1 contact, 1 partner, and 1 resource.	The matching contact is set as the primary contact in the SR.	An acknowledgment email is sent to the sender.
Sender's email address matches the email address of 2 contacts.	No primary contact is set in the SR.	An acknowledgment email is sent to the sender. The email states that the sender couldn't be identified because multiple contacts were found with the email address of the sender. More information is requested from the sender.
Sender's email address matches the email address of 2 contacts and 1 partner.	No primary contact is set in the SR.	An acknowledgment email is sent to the sender. The email states that the sender couldn't be identified because multiple contacts were found with the email address of the sender. More information is requested from the sender.
Sender's email address matches the email address of 1 partner and 1 resource.	The matching partner is set as the primary contact in the SR.	An acknowledgment email is sent to the sender.
Sender's email address matches the email address of 2 partners and 1 resource.	No primary contact is set in the SR.	An acknowledgment email is sent to the sender. The email states that the sender couldn't be identified because multiple contacts were found with the email address of the sender. More information is requested from the sender.
Sender's email address matches the email address of 1 resource.	The matching resource is set as the primary contact in the SR.	An acknowledgment email is sent to the sender.

6. All other email IDs in the **To** and **CC** fields in the message are checked to see whether they exist as resources or contacts in the application.
   - If they exist as contacts, they're added to the SR contacts.

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       o If they exist as resources, they're added to the SR team.

> **Note:** If the other email IDs don't match any resource or contact in the application, then those IDs aren't added to the SR. But they're displayed in the SR message.

7. If the primary contact set in the SR is associated with only one account, then that account is associated with the SR. If the primary contact is associated with more than one account, then the primary account of the primary contact is set as the account on the SR.
8. The incoming message content and the attachments are added to the new SR.

How do I use inbound message filters?

Based on the inbound message filter criteria you set, incoming messages from customers or partners can be accepted or rejected.

Message filter patterns are specified using regular expressions. For example, to specify a filter pattern to accept all emails from Oracle employees, the regular expression is given as: **^[A-Za-z0-9._%+-]*@oracle\.com**

You can set more than one filter. Filters are arranged in the descending order of priority on the Manage Email Filters page. The topmost filter has the highest priority. When a message comes in, the filter criteria are checked in the order of priority. If the first filter criterion doesn't apply to a message, the next ones are checked. If any of the filter criteria match the incoming message, the message is accepted or rejected based on the filter specifications.

> **Note:** It's important that you pay special attention while setting up email filters. If the User Messaging Service (UMS) setup rejects any email due to the filter setup, the rejected email can't be processed again by the application and it's lost.

To view the existing inbound message filters or to reorder their priorities:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Service
    - Functional Area: Communication Channels
    - Task: Manage Email Filters

    The Inbound Message Filters page displays a list of the existing inbound message filters.
2. To change the priority of a filter:
    a. Select the filter whose priority you want to change.
    b. Click anywhere on the empty spaces in the selected row, and then drag the row to the required position.

How do I export and import assignment objects and rules setup data?

You can understand how to export and import assignment objects and rules setup data, along with the points to consider while moving the setup data in this topic.

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Most application implementations require moving functional setup data from one instance into another at various points in the life cycle of the applications. For example, in an enterprise application implementation, a development or test instance is first deployed before deploying a production instance. You can move functional setup configurations for assignment objects or assignment rules from one application instance into another by exporting and importing configuration packages from the Manage Configuration Packages page.

To export and import assignment setup data, start by defining an implementation project for the required assignment setup task. The following are some examples of assignment tasks:

- Manage Customer Center Assignment Objects
- Manage Service Assignment Manager Objects

The Manage Configuration Packages setup task exports the assignment objects or rules setup data.

A configuration package contains the setup import and export definition. The setup import and export definition is a list of setup tasks and their associated business objects that identifies the setup data for export and the data itself. You generate the setup export and import definition by selecting an implementation project and by creating a configuration package. The tasks and their associated business objects in the selected implementation project define the setup export and import definition for the configuration package. In addition, the sequence of the tasks in the implementation project decides the export and import sequence.

You can export a configuration package once you create it, or at any time in the future. During export, appropriate setup data is identified based on the setup export definition, and is added to the configuration package. The setup data in the configuration package is a snapshot of the data in the source application instance at the time of export. Therefore, publish the assignment objects and rules before exporting them.

After the export completes, you can download the configuration package as a compressed archive of multiple XML files, move it to the target application instance, and upload and import it. Review and publish the assignment objects and rules setup data in the target application instance to make them available for assignment processing.

What's Computer Telephony Integration (CTI)?

Computer telephony integration (CTI) enables integration of third party media toolbars with Fusion Sales and Fusion Service. You can display a media toolbar by enabling the Partner CTI Service, and by giving your signed-in users the Access Partner Media Toolbar privilege which allows access to the toolbar.

Use CTI to:

- Make an outbound call using Click to Dial and skip manual dialing.
- Receive phone calls.

Integrating with CTI gives you the following features:

- Notifications of incoming calls and ability to accept or reject the call
- Automatic caller identification
- Ability to search for a contact
- Optional caller verification
- Display of administrator-defined screen pop with caller or service details
- Automatic interaction recording
- Optional call wrap up

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You can build this integration using the provided MCA Media Toolbar APIs or you can engage with one of Oracle's telephony partners. To connect with telephony partners, go to *Oracle Cloud Marketplace* and search for any one of the following:

- OpenMethods PopFlow

- OpenMethods Harmony (choose Harmony for B2B Service)

- Five9 (Cloud Contact Center for Oracle B2B Service)

How do I configure screen pop pages?

You can configure screen pop pages to display pages of information that can aid an agent to start a customer interaction efficiently. For example, you can configure a screen pop page to display information about an open ticket logged by the call-in customer.

You can create screen pop pages for ready-to-use standard business objects or for user-defined objects. To create screen pop for user-defined objects, you must first create the objects, define the fields, pages, and other elements using Application Composer.

You configure screen pop pages in Setup and Maintenance using the following steps:

1. *Configure business objects*. These business objects are associated with standard or user-defined objects. Standard objects include ready-to-use objects, such as Service Requests or Queues, and the user-defined objects are created by the user.
2. *Create tokens*. Tokens are associated with the attributes of a business object. For example, you can create a token called *SVC_INVOICE_DATE* and associate it with the *Invoice_Date* field of the *Invoices* business object.
3. Map pages. Mapping associates a screen pop page with the pages of the underlying standard or user-defined object.
4. Create rules. Rules identify the page that's displayed when passing a token. Rules are defined in order of priority. For example, create rules that, if a service request number is available, display the service request page. If no service request number is available, but there's a contact identified, display the **Edit Contact** page. If no service request or contact information is available, display the **Create Contact** page.

The following figure illustrates the process of configuring screen pop pages:

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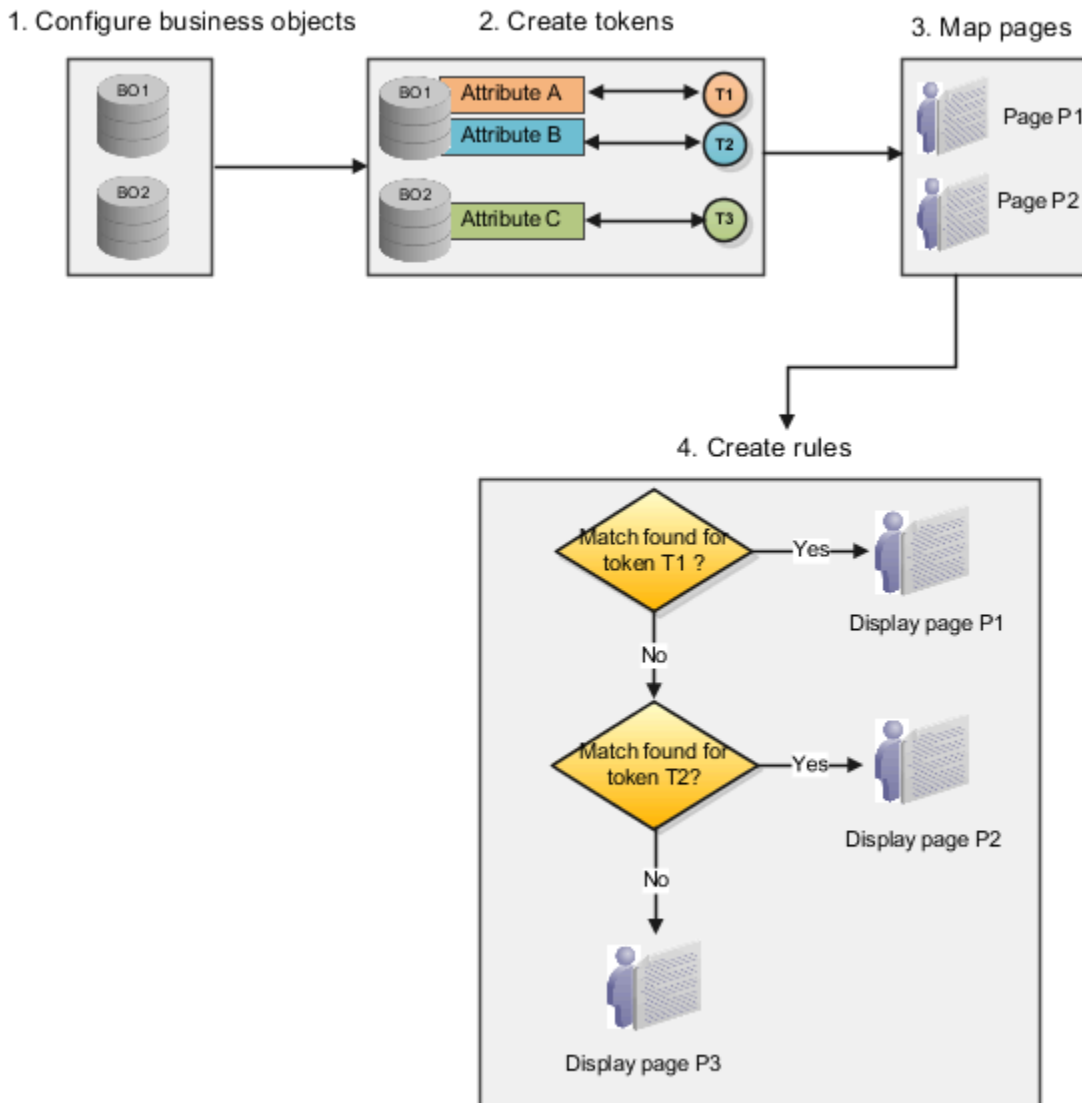
How do I manage SmartText entries?

A SmartText entry is a reusable fragment of text that you or your users can create and use in service request messages. You can also create SmartText messages to use in chat.

As an administrator, you can create public SmartText entries that all users can use. Users can't edit these entries.

You can create SmartTexts in multiple languages. You can use rich-text to create SmartText entries in service request message fields by enabling HTML. Other service request fields, such as Problem Description, Solution Description and Transfer Service Request only support plain text. You can also create SmartText entries for chat.

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You can create SmartText entries for a specific business unit if you've the HZ_ENABLE_MULTIPLE_BU_CRM profile option enabled (set to Y). With this profile option enabled, the Business Unit drop-down list is displayed in the Manage SmartText UI so you can assign a BU at the time you create a new SmartText. For more information, see Manage Common CRM BU Profile Options for Service BUs.

You can define where to save the SmartText entry, insert variables in the entry, and choose to share the SmartText entry by using the following availability options:

- **Always**: Select this option to make the SmartText entry available to users at all times.

- **Interval**: Select this option and define the period during which this entry is available to users.

- **Disabled**: Select this option to disable the SmartText entry and display it in the public folders for the users.

Required Privileges

The following table shows the different privileges you grant to allow your users SmartText access.

Privilege	Code	Description
Use SmartText	SVC_USE_STD_TXT_PRIV	Allows a user to view, search and insert SmartText.
Manage SmartText	SVC_MANAGE_STD_TXT_PRIV	Allows a user to create, update, and delete SmartText for their own use.
Publish SmartText	SVC_PUBLISH_STD_TXT_PRIV	Allows a user to set the scope of SmartText to GLOBAL which allows any user with the correct privilege to view and use that entry.
Administer SmartText	SVC_ADMIN_STD_TXT_PRIV	Allows the user to administer SmartText.

Require Agents to Provide User Entered Values when Inserting SmartText

You can enable your application to require agents to enter values for user variable prompts when they select a SmartText. This ensures that all requested data is captured.

Here's the profile option you need to set to activate the functionality:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Productivity Tools
   - Task: Manage Global Search Profile Options
2. Search for the profile option code ORA_SVC_SMARTTEXT_MANDATORY_USER_VARIABLES
3. Set the site level profile value to **Yes**.
4. Click **Save and Close**.

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How do I set up inbound and outbound email?

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

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

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

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

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How do I automatically route chat work assignments to agents?

Routing rules identify queue assignments, which could be sent to a queue with live agents or the Oracle Digital Assistant (ODA) queue. They also escalate a chat from ODA to a live agent queue.

> **Note:** Chat assignments must be created in the Generic Queuing Rules Category and should be unique.

Here's how you create a rule set:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Communication Channels
   - Task: (select All Tasks from the Show menu) Manage Service Assignment Rules
2. From the Category drop-down list, select Generic Queuing Rules.

   > **Note:** Depending on what application you're using, Service Center, Help Desk, you select the corresponding generic category.

3. Click the **Add Row (+)** icon in the Rule Sets area.
4. Enter a name for the rule set.
5. In the Rules area, click the **Create (+)** icon, then do the following:
   a. Enter a name and description in the respective fields.
   b. (Optional) Set an effective start and end date.
   c. Click the **Add Row (+)** icon in the Conditions area.
   d. From the **Object** drop-down list, select **Any**.
   e. From the **Attributed** drop-down list, select an attribute that you want to use in routing chats.
   f. Select a value that must match to route your chats.
   If you're setting up your chat requests to route to Oracle Digital Assistant, you'd select the Escalation Level attribute and set the value to equal 0 (zero). Then, you'd create a second rule within the same rule set to route to a live agent queue. The second rule would have the Escalation Level greater than 0 (zero).You can add other criteria to use for routing as needed.
6. When you're finished, click **Save and Publish**.
7. To confirm the rule was published, click the **Refresh** button.

A few things to note with routing rules

- Custom Attributes: If you've added a custom attribute and want to use it in routing rules, you must expose the custom field or object using the **Communication Channels > Manage Service Assignment Objects page** task on Functional Setup Manager.
-
  - You can select or deselect the **Use Score** option on a rule set. If you select Use Score, then for every rule in the rule set, you must indicate the amount to increase the score when the rule is true. You must then associate the rule set to queues that receive that score. All the rules in a rule set are executed, and the queue with the highest total score is selected. · If the rule set has multiple rules and you didn't select the

Use Score option, you must define the criteria for each rule to be mutually exclusive from other rules in the rule set. This ensures that the resulting queue assigned by the application is predictable in all situations.

How do I configure an email channel?

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

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

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

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

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

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

  The SVC_INBOUND_EMAIL_ADDRESSES profile option contains two email IDs:

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

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

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

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

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

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

To configure an email channel for the customer:

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

   - Offering: Service
   - Functional Area: Communication Channels
   - Task: Manage Communication Channels
2. In the **Service Channels** page, click **Create Channel**.

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3. In the **Create Channel** window:
    a. Select a **Stripe Code**.

      Select **CRM** to process emails from and to external customers. Select **HCM** to process emails from and to internal employees, through the HCM Help desk support.
    b. The **Purpose** field is set to **Support** by default.
    c. Select the **Channel Type** as **Email**.
    d. Specify the support email ID of your company as the **Account Name**. For example:

      `support@mycompanydomain.com`

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

      The channel code is autogenerated and it uniquely identifies a communication channel when exporting or importing channels from one environment to another.
      - If the auto-generated channel code is unique, you can leave it unchanged.
      - If the auto-generated channel code isn't unique, add a set of characters to the code to make it unique.
    f. (Optional) Specify a **Display Name** to indicate any information about the channel, such as the name of the deploying company for which the channel is being configured.
    g. When a new channel is being created, it's active by default. To deactivate it, clear the **Active** option.
    h. (Optional) From the **Business Unit** drop-down list, select a Business Unit (BU).

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

How do I configure a job to process inbound emails?

You can configure a new job to retrieve emails at regular intervals, based on the specified frequency.

> **Note:** Inbound email is an asynchronous channel. When you have a high volume of emails, the emails are queued up and processed. Inbound email processing can take anywhere from 10 minutes up to 1 hour from the time the user sends an email depending on your inbound email volume and the frequency at which you've scheduled ESS job to process inbound emails.

To configure a job to process inbound emails:

1. From the Navigator menu, select the **Scheduled Processes** option.
2. In the **Scheduled Processes** screen, click **Schedule New Process**.
3. In the **Schedule New Process** dialog box, select **Job** as the **Type**.
4. Search for and select the **Retrieve Inbound E-mail Messages** option from the **Name** drop-down list.
5. Click **OK**.
6. In the **Process Details** dialog box, click **Advanced**.
7. In the **Schedule** tab, in the **Run** options, select the **Using a schedule** option.

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8. Select **Frequency** and specify a **Start Date**.

> **Note:** You must ensure that you always select a frequency, whether you're using your test or your production environment. You can select a higher frequency if required. If you run a job manually without setting a frequency, the process might not retrieve all the emails. When you schedule the job to run periodically, it pulls all the emails from all the servers. After scheduling the ESS job your application may take few iterations of the job to refresh the caches that are required for the successful execution of inbound email processing. As a result, email processing might be delayed until the required caches are fully refreshed.

9. Click **Submit**.

A job is scheduled to process inbound emails.

> **Note:** Inbound emails work properly only for SRs whose reference numbers have the following characters: [A-Z], [a-z], [0-9], and the special characters hyphen (-), colon (:), period (.), comma (,), or underscore (_). So you can use only one of these characters as the prefix for an SR reference number. You can't use any other special character in the prefix apart from the ones mentioned.

How do I configure profile options for inbound and outbound email?

You can set options for incoming and outgoing emails by configuring email profile options. For example: In the SVC_OUTBOUND_EMAIL_FROM profile option, you can set the From email ID that you use to respond to a customer's email.

Configure the inbound email profile options as specified in the following table.

Inbound Profile Options	Description
SVC_ENABLE_INBOUND_EMAIL_ DEFAULT_PROCESSING	Indicates whether inbound emails from customers must be processed automatically by creating or updating an SR. If this option is disabled, only the inbound message object is created, without creating an SR.
SVC_INBOUND_EMAIL_ADDRESSES	Indicates the inbound email IDs that are monitored by the Service application. The email IDs are separated by a comma and are automatically populated during provisioning. You must use the address to set a forwarding rule. Try to avoid updating these inbound email addresses. If you update these inbound email addresses for some reason, you must complete the following steps: • Update the corresponding forwarding rule. • Ensure that you register the updated inbound email addresses as access points for inbound email.
SVC_INBOUND_ENABLE_INLINE_ ATTACHMENTS	Enables the display of images inline within the SR messages in the UI. The default value is Yes.
SVC_INBOUND_EMAIL_MAX_ATTACH_ SIZE	Indicates the maximum size in MB of attachments that are allowed in an inbound email.

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Inbound Profile Options	Description
	The default value is 10 MB. Here are some key points to note: • The recommended maximum limit for the email size is 15 MB. Email size includes email headers, attachments, and the email content. **Note:** You can increase the size of the attachments past 15 MB, but this isn't recommended as it might cause server issues • If an email contains non text content or attachments, that gets base64 encoded, and this can increase the overall size of the email. So when your users send emails that exceed a total size of 15 MB, such emails aren't processed by the server.
SVC_INBOUND_MESSAGE_BATCH_SIZE	Indicates the number of emails that can be processed at a given time. This is the maximum number of emails retrieved by every run of the Retrieve Inbound Email Messages scheduled process. The default value is 10.
SVC_EMAIL_PROCESS_UNKNOWN_CUST	Indicates whether an SR must be created for emails sent by unknown customers.
SVC_ENABLE_INBOUND_EMAIL_ ACKNOWLEDGEMENT	Indicates whether an acknowledgment must be sent for an incoming email. If you prefer not to have emails sent when SRs are created, disable this profile option. To disable it, use the Manage Administrator Profile Values task in Setup and Maintenance. Search for the SVC_ENABLE_INBOUND_EMAIL_ACKNOWLEDGEMENT profile option, and then set the profile value to **No**.
SVC_INBOUND_ACK_EMAIL_LIMIT_PER_ USER	Specifies the maximum number of emails to be sent to one user within a specific time interval. This time interval is specified in the SVC_INBOUND_ACK_EMAIL_TIME_INTERVAL profile option. The default value is 3. **Note:** Let's say you don't want to use this feature, and you want to send an acknowledgment email for every email received from a user. In that case, you can set this profile option to a high value such as 100. It's a good idea to simultaneously set the SVC_INBOUND_ACK_EMAIL_TIME_INTERVAL profile option to a low value such as 5 minutes. This profile option also helps to prevent the creation of infinite email loops.
SVC_INBOUND_ACK_EMAIL_TIME_ INTERVAL	Specifies the time interval for which the limit check is applied for the maximum number of emails to be sent to a user. This means that only the maximum number of emails specified in the SVC_INBOUND_ACK_EMAIL_ LIMIT_PER_USER profile option can be sent to one user in this time interval. The default value is 60 minutes.

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Inbound Profile Options	Description
	Note: Let's say you don't want to use this feature, and you want to send an acknowledgment email for every email received from a user. In that case, you can set this profile option to a low value such as 5 minutes. It's a good idea to simultaneously set the SVC_INBOUND_ACK_EMAIL_LIMIT_PER_USER profile option to a high value such as 100. This profile option also helps to prevent the creation of infinite email loops.
SVC_INBOUND_EMAIL_PATTERN_TO_STOP_ACK	Specifies the email patterns that must be blocked, so that the application stops sending acknowledgment emails to email addresses having those patterns. The default email pattern is **postmaster@.*.oraclecloud.com**.
ORA_SVC_ENABLE_FAILED_INBOUND_MESSAGE_PROCESSING	Enables the automatic processing of inbound messages that weren't processed earlier because of internal issues. The default value is Yes. To stop the retrieval of unprocessed messages at any time, you can set the value to No.
ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE	Enables the agents to see the images or attachments from the first email received on an SR in both the SR header and the SR message. The default value is No.
ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY	Enables viewing of images and logos inline within the body of the SR message, but the inline images aren't captured as regular SR attachments. The default value is No. When it's set to Yes: • Documents received as attachments to inbound emails are included in the SR attachments. • Images such as logos in the sender's signature and inline images aren't included in the SR attachments. **Note:** When you set this value to Yes, the ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE profile option is automatically set to Yes.
ORA_SVC_INBOUND_MSG_LAST_REPROCESSING_DAYS	Specifies the number of days before the current date when the failed inbound messages are to be reprocessed. The default value is 1.
ORA_SVC_ENABLE_INBOUND_PARTIAL_STATUSES_FOR_REPROCESSING	Enables the reprocessing of unprocessed inbound emails from the past. The default value is No. When it's enabled, reprocessing starts from the last point where the processing stopped earlier.
ORA_SVC_ADD_EMAIL_RECIPIENTS_TO_SR	Enables you to choose whether to add the sender and recipients of inbound emails as an SR contact or SR team member. For a new SR, the recipients in the To or Cc lists are added as SR contacts or SR team members, if their email IDs exist as valid party records in the application. For a reply email to

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Inbound Profile Options	Description
	an existing SR, the sender and the contacts or team members in the To or Cc lists are added as SR contacts or SR team members if they don't already exist in the SR. The default value is Yes. When you set the value to No, the sender and recipients of inbound emails aren't added to the SR. **Note:** The sender of the first email is always added as the primary contact on the SR, irrespective of the value of this profile option.
ORA_SVC_UNREGISTER_INBOUND_ACCESS_POINT	Specifies whether to make the **Unregister** button available. The default value is No. When it's set to the default value, the **Unregister** button isn't available. This setting helps to prevent unregistering of access points accidentally. Only when you specifically need to unregister an access point, you can change the value to Yes so that the **Unregister** button is available. After unregistering the access point, you can set the value of this profile option back to No.
ORA_SVC_INBOUND_REPROCESSING_OFFSET_IN_MINUTES	Used to reprocess inbound emails when it fails to create customer message on the SR. The default value of this profile option is set to 120 (2 hours). After this duration, the reprocessing logic will try to create customer message again on the SR.
SVC_INBOUND_EMAIL_REGEX_TO_EXTRACT_SR_NUMBER	Used to create and send a new message for an existing SR. **Note:** If the default value can't extract the SR number from the inbound email body, then try adding an extra # to the default value.
ORA_SVC_INBOUND_MSG_EXCHANGE_ONLINE_BATCH_SIZE	Specify the maximum number of inbound messages to read from Microsoft Exchange online in one ESS Job iteration. The default value is 10 The maximum value is: 200
ORA_SVC_INBOUND_MSG_EXCHANGE_ONLINE_FETCH_SIZE_PER_BATCH	Specify the maximum number of inbound messages to be processed from Microsoft Exchange online in one subset of a batch. The default value is 10 The maximum value is: 20
ORA_SVC_INBOUND_MSG_EXCHANGE_ONLINE_DELETE_SIZE	Specify the maximum number of inbound messages to be deleted from Microsoft Exchange online in one subset of a batch. The default value is 10 The maximum value is: 20

Configure the outbound profile options for Service as specified in the following table.

Outbound Profile Options	Description
SVC_OUTBOUND_EMAIL_FROM	Indicates the From email that's used for sending outbound emails to customers. The default value is `noreply@oracle.com`. You must set the value to the no reply address for your company to prevent auto-replies from creating unintended SRs.

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Outbound Profile Options	Description
	This profile option can have the no reply email address with or without the display name. Example without display name: `noreply@mycompanydomain.com`. Example with display name: Acme Support `<noreply@mycompanydomain.com>`. If the profile option value doesn't contain a display name, the display name of the email channel is used in the From address. Let's say you set the value of this profile option as your support email ID such as `support@mycompanydomain.com`. If your From email address isn't displayed in your email received by your customer, then you'd receive a verification email at `support@mycompanydomain.com`. You must follow the instructions in that email to verify the account. If you don't have access to the inbox for `support@mycompanydomain.com`, then you must do one of the following: • Contact Oracle support to get your email account verified. • Set the value of this profile option to another valid email address that you can access. Now when you send your first email to a customer, you receive a verification email. You must click the confirmation link in the email to complete the verification.
SVC_SR_FORWARD_TEMPLATE_NAME	Indicates the email template name for SR messages of type Forward.
SVC_SR_RESPONSE_TEMPLATE_NAME	Indicates the email template name for SR messages of type Response.
SVC_SR_SYSTEM_RESPONSE_ TEMPLATE_NAME	Indicates the template name for SR messages of type System Response.
ORA_SVC_SR_EMAIL_ATT_SIZE	Indicates the maximum permitted total size in MB of all the attachments in an outbound email that's sent from the Service application. Oracle recommends keeping this value less than or equal to 10 MB. The default value is 10 MB. Here are some key points to note: • The maximum limit for the email size is 15 MB. Emails greater than 15 MB in size aren't processed by the email server. Email size includes email headers, attachments, and the email content. If an email contains non text content or attachments, that gets base64 encoded, and this can increase the overall size of the email. • Use this profile option to restrict the email attachment size such that the total email size doesn't exceed 15 MB.
SVC_ENABLE_ACKNOWLEDGMENT_TO_ ALL	Indicates whether an acknowledgment must be sent to users both in the To and Cc lists for every inbound email that's received.
SVC_ENABLE_DEEPLINKS_IN_ OUTBOUND_EMAIL	Indicates whether the deep links to KM articles are enabled in outbound emails and email previews. When the deep links are enabled, this helps to translate and populate the complete URL to view the articles.
ORA_SVC_ENABLE_RESOURCE_NAME_ USAGE_IN_OUTBOUND	Enables the use of the resource name as the sender name in outbound emails. The default value is No.
ORA_SVC_ENABLE_RESOURCE_EMAIL_ USAGE_IN_OUTBOUND	Enables the use of the resource email as the sender email in outbound emails. The default value is No.
ORA_SVC_ENABLE_INLINE_ ATTACHMENTS_IN_OUTBOUND_EMAIL	This profile option only impacts inline attachments, not regular attachments.

To configure email profile options:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Communication Channels
   - Task: Manage Inbound Email Profile Options, or Manage Outbound Email Profile Options
2. Click the name of the profile option to be set.
3. In the **Manage Email Profile Options** page, in the **Profile Values** section, click the plus icon to add a value.
4. Click **Save**.

> **Note:** Alternatively, you can click the **Manage Email Profile Options** task to display the Email Profile Options page. On this page, you can view the list of all inbound and outbound email profile options and set their values. You can also search for a specific profile option code using the search bar.

How do I monitor milestones?

You configure the Monitor Service Request Milestones scheduled process to monitor the service request milestone status, and set the job frequency to run the job after the specified time interval.

This process ensures that the service request and milestone status are up-to-date and sends an email notification if compliance issues or warning flags are found. The recommended frequency for running this job is 10 minutes.

How do I assign work to agents?

Work assignment refers to interactions or work items such as service requests (SRs) being assigned to queues for processing.

Work items are assigned to a queue and an agent is assigned to one or more queues. All work items in a queue are handled by the assigned agents.

A work item can be assigned to an agent manually or automatically based on whether the associated queue is automatic or manual. For more information about the types of queues, see *"How to Assign Agents to Work Items"*.

> **Note:** In automatic queues, the priority of SRs is calculated based on severity and wait time. SRs with highest severity are assigned first. If there are multiple SRs with the same severity, those SRs that have been in the queue for the longest time are assigned first. But this rule applies only to bigger volumes of SRs and many agents and not on a small scale. For more information, see *"Order in Which SRs Are Assigned"*.

Work assignment in an automatic queue is done based on the following aspects:

- Agent capacity
- Availability of the agent
- Presence of the agent
- Severity of the work item

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- Age of the work item

> **Note:** Omnichannel must be enabled to use the settings for presence of the agent, availability of the agent, and agent capacity.

Here are the various ways an SR can be assigned to an agent:

- Manually set the **Assigned To** field in the Summary tab of the Service Request Details page.
- Click **Assign to Me** from the **Actions** menu on the Service Request Details page.
- Enable Omnichannel.

How do I set channel capacity?

Channel capacity indicates the maximum number of active interactions that an agent can handle. When the number of active interactions in an agent's queue reaches the specified capacity, the agent is considered to be 100 percent occupied.

For non-real-time interactions, you define what qualifying statuses are considered to be active when calculating an agent's capacity. Decide if any interaction in one of the specified qualifying statuses is considered to be an active interaction.

Here's some helpful pointers for setting up capacity for your agents:

- Oracle recommends not setting a high capacity number. The number should be relatively small so that routing can balance the work to agents.
- Agent capacity for a non-real-time channel such as service requests (SRs) is independent of the capacity for real-time channels such as chat. For example, let's suppose that the SR capacity is set to 30 and chat capacity is set to 2. And let's say an agent handles 15 open SRs and 2 chats. Then, that agent is considered to be 50 percent occupied for non-real-time work and 100 percent occupied for real-time work.
- Let's consider another example of how the workload is calculated when you have multiple work items such as SRs, activities, and escalations. Suppose an agent has a capacity of 5 for SRs and 2 for escalations. This doesn't mean the agent can work on 5 SRs and 2 escalations simultaneously. One SR takes up 20 percent of that agent's capacity, and one escalation takes up 50 percent of capacity.

To set channel capacity:

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

   ○ Offering: Service
   ○ Functional Area: Communication Channels
   ○ Task: Manage Capacities

   The Manage Capacities page displays capacities for real-time and non real-time channels. To change the total channel capacity, change the default values in the **Capacity** fields for the channels.
2. To provide queue owners and customer service managers the ability to change the channel capacities for individuals by overriding the global default capacities:

   In the Override Individual Capacities region, select the **Enable Channel Capacities to Be Overridden for Individuals** checkbox.

3. To change the capacity of a non real-time work:

   a. In the **Work Assignments** region, change the default value in the **Capacity** field to a new value.

   b. The status in the **Qualifying Status Values** column indicates the status of the work items that decide the capacity. For example, if the status is set to **New, In Progress**, only the work items that are in the specified status add up to the total capacity. To specify the active statuses, click the status value.

   c. In the **Qualifying Status Values** window, select a status from the **No Effect on Workload** list and move it to the **Adds to Workload** list to qualify the status as active.

   d. Click **Apply**.

4. To change the capacity of a real-time work, change the value in the **Capacity** field in the **Communication Channels** region.

5. Click **Save and Close**.

> **Note:** When you export or import the functional setup data for the Service offering by using the export and import feature in Functional Setup Manager, the Manage Capacities setup is also exported or imported. But the value of the **Override Individual Capacity** checkbox isn't exported or imported. You must manually select or deselect the checkbox.

What are the Media Toolbar APIs?

Use the media toolbar APIs with all toolbars that handle communication between agents and customers. The toolbar loads the APIs which are implemented in a JavaScript file format.

> **Note:** Although media toolbar APIs are generic to all media channels, the 11.13.0.0 release supports only Phone and integration with CTI partner systems.

API Classification

The media toolbar APIs facilitate the initial configuration of the loaded toolbar. Use them to set up functionality for both the partner toolbar and ServiceCenter. There are three main flows of the toolbar interaction:

- Initial configuration of the partner toolbar and communication with Service Center.

- Inbound communication handling.

- Outbound communication handling.

The APIs are independent of communication channels, but use channel information as a parameter, passing it to Service Center to identify whether a toolbar supports multiple channels. You define and configure the channels using Functional Setup Manager. The APIs support both preconfigured and user-defined channels.

Data Flow Methods

The following figures show the flow of the methods that are called by the toolbar. The method calls can be required or optional. If a call is required, the toolbar implementation must make one call for each communication event, unless you specify otherwise. If a call is optional, the toolbar implementation can make a call whenever necessary, depending on the action needs.

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The following figure shows the configuration workflow.
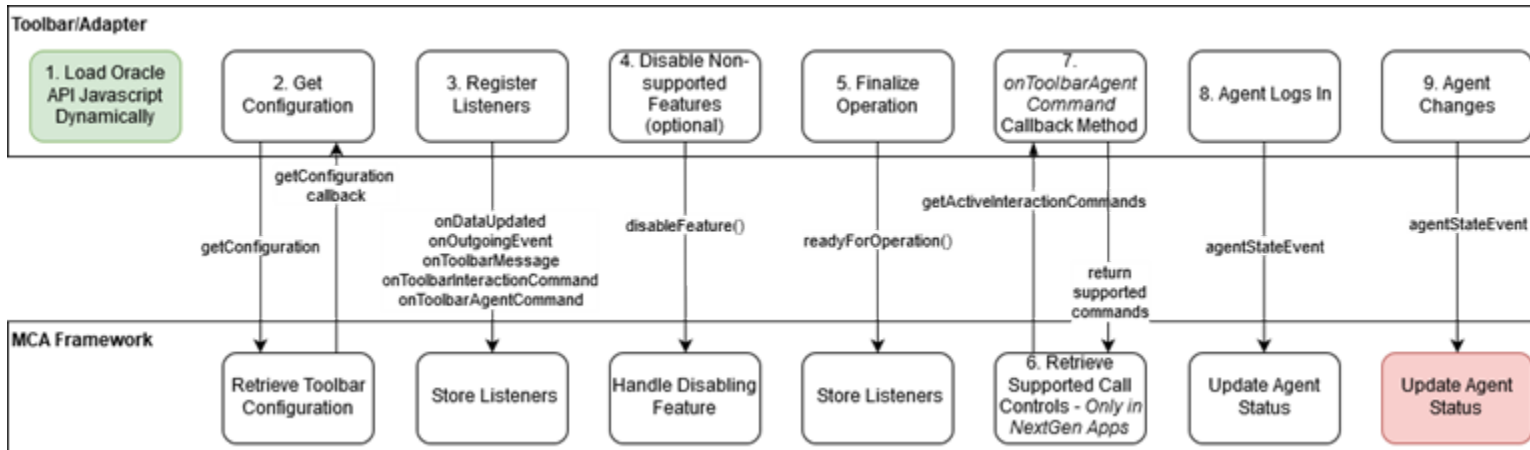
This figure shows the inbound call workflow.

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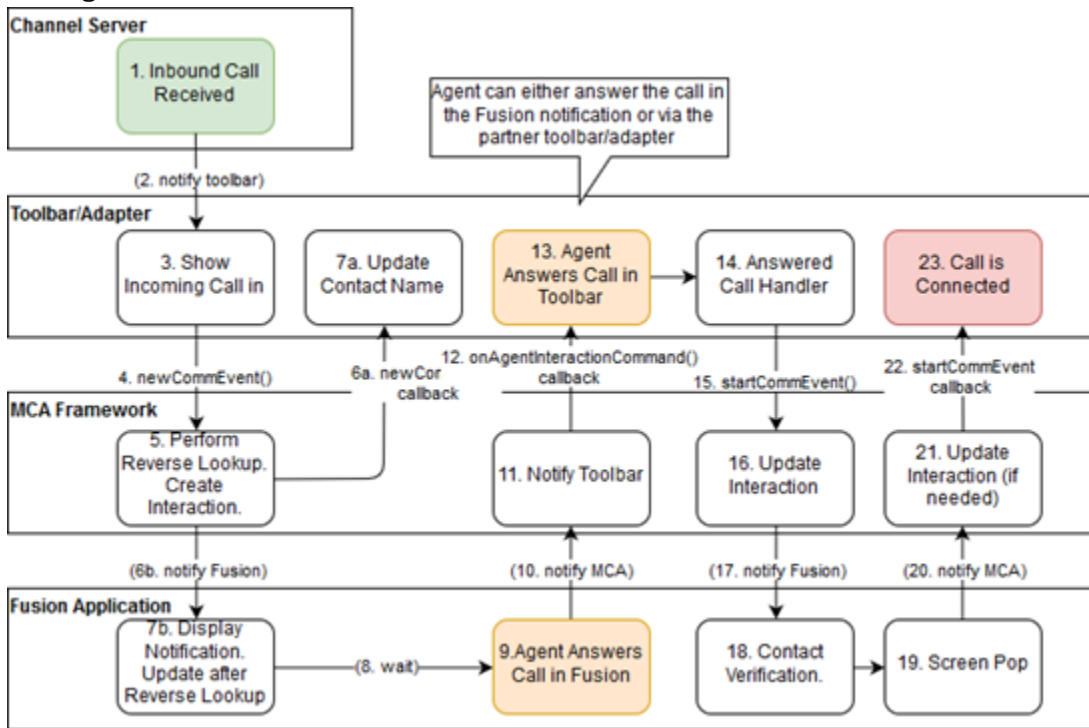
This figure shows the outbound call workflow.
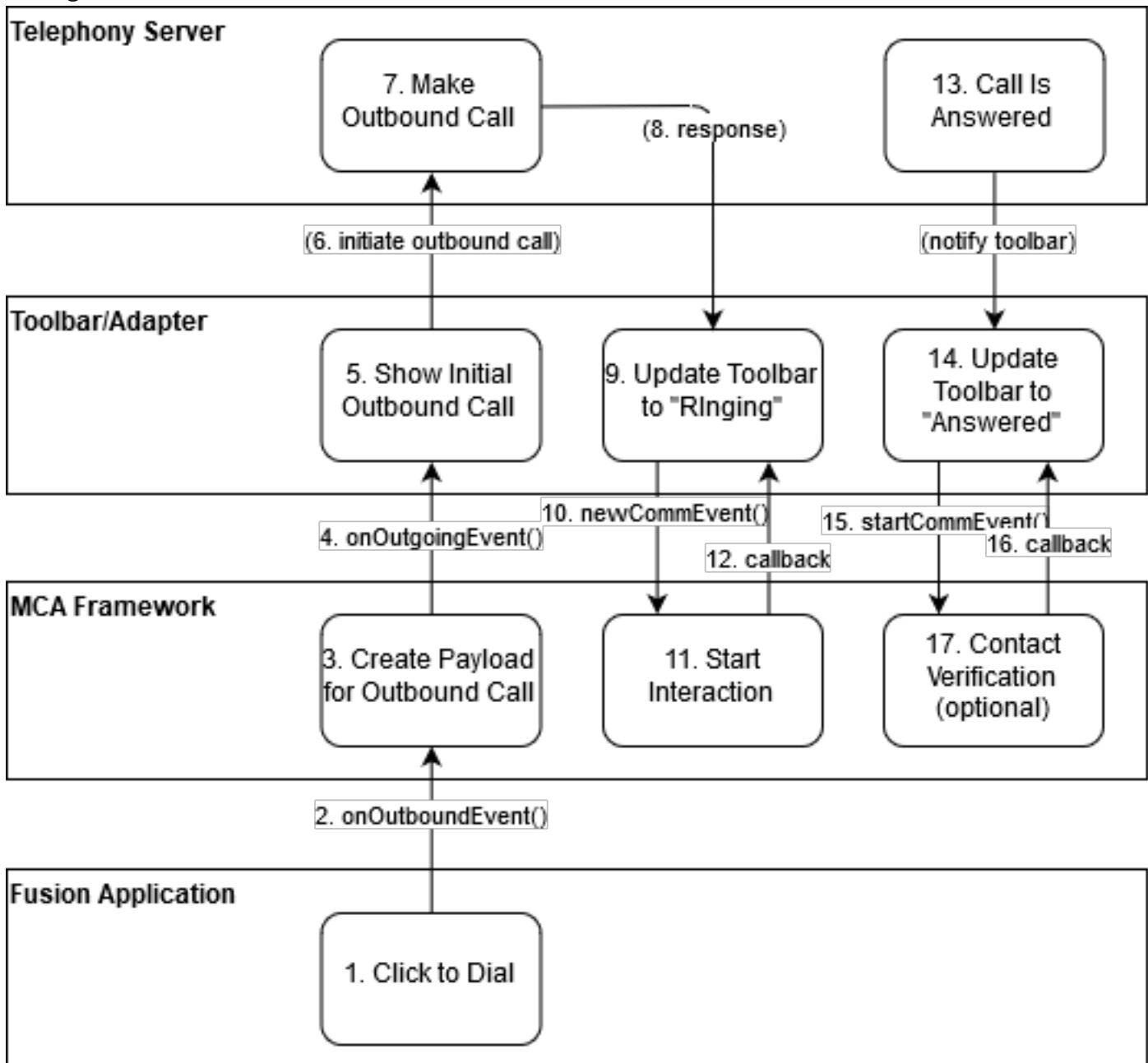
And this figure shows the end of call workflow.

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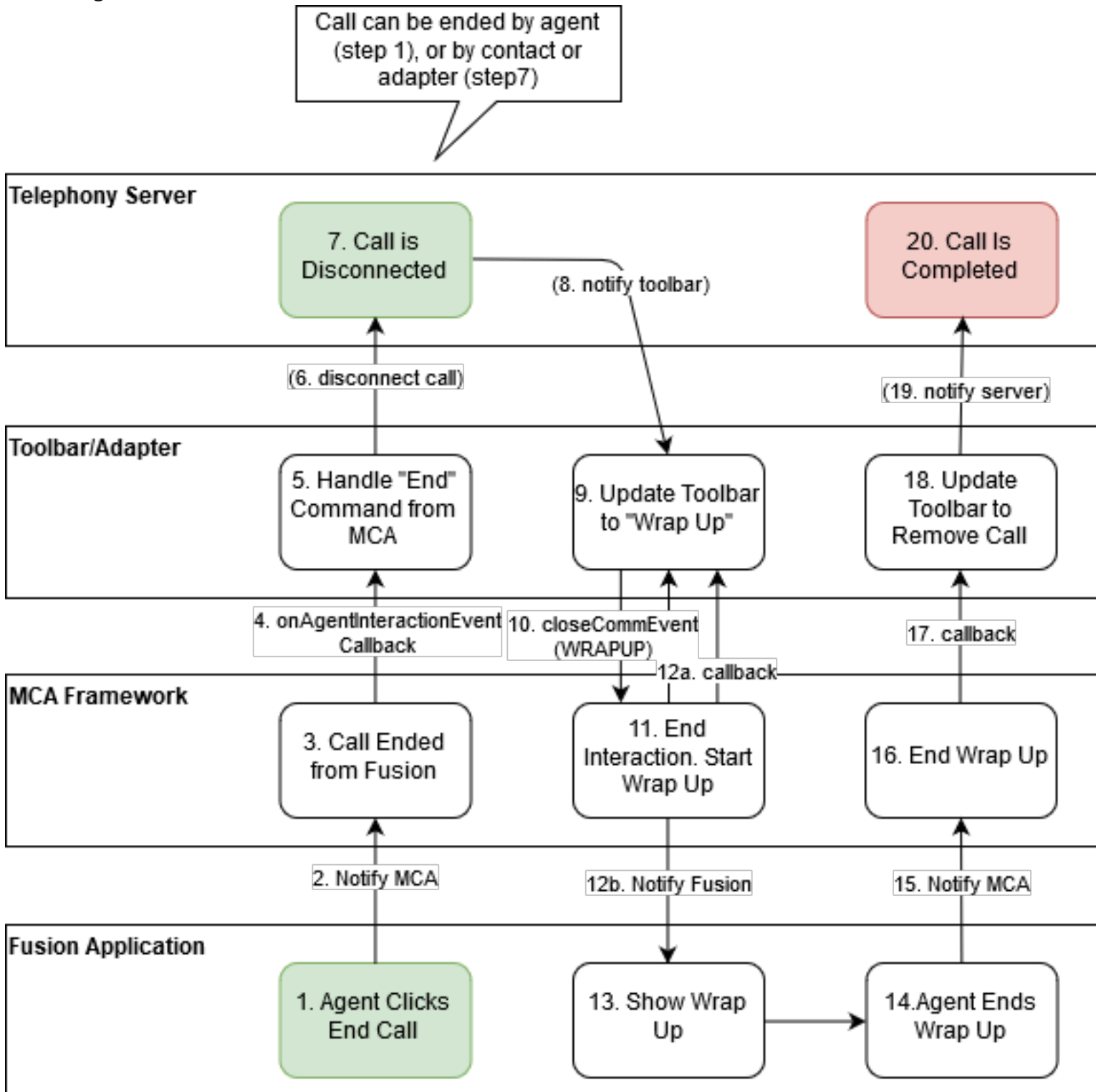
How do I access Knowledge in Service Requests?

You must set up Knowledge such that agents can access and view knowledge articles in service requests (SRs). When you enable Knowledge, agents can see recommended articles based on contextual information in the SR, access and update their favorite articles, and search for knowledge articles.

> **Note:** This answer is applicable to Fusion Service Knowledge Management with the Classic User Experience.

> **Note:** You must have the Sales Administrator or Service Administrator role to enable this feature.The UI limits Knowledge search results in SRs to 30 articles.

To enable Knowledge in Service Requests:

1. Click Setup and Maintenance in the springboard menu.
2. Select the Service offering.
3. Select the Service Request functional area.
4. Click Manage Service Request Knowledge Profile Options.
5. Set the SVC_ENABLE_KNOWLEDGE_IN_SR profile value to **Yes**.

Why can't I create articles in Knowledge Authoring?

Authors can create and manage articles only in the locales assigned to them. Authors will be unable to view the content types for creating articles if they aren't assigned a locale. You must assign at least one locale to every author so that they can work in Knowledge.

> **Note:** This answer is applicable to both Fusion Service Knowledge Management with Redwood and Classic User Experience.

To assign locales to a knowledge author user:

1. From the springboard, select **Knowledge > Knowledge Users**.
2. Search and select the knowledge author user.
3. Select the locales that you want to add and click the arrow icons to move the locales from **Available Locales** to **Selected Locales**.
4. You can select multiple locales in a single operation, or select all of the locales using the double arrow.
5. Click **Save**.

How do I enable productivity tools?

Productivity tools show as features on service request create or edit pages.

The following table lists productivity tools that are available for service requests.

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Productivity tool	Description	Profile Option Code
SmartText	A reusable fragment of text that you can insert in messages and fields	SVC_ENABLE_STD_TEXT_IN_SR
Keyboard Shortcuts	A combination of keyboard keys that can be used to quickly access actions and buttons on the service request pages.	SVC_ENABLE_KEYBOARD_SHORTCUTS_IN_SR
SR Audit	A subtab that displays the history of service requests from the time they're created. If you use custom roles, you must add the following two privileges to the roles in Security Console for those users to see the SR Audit subtab: • FND_VIEW_AUDIT_HISTORY_PRIV • SVC_VIEW_SR_AUDIT_HISTORY_PRIV	SVC_ENABLE_AUDIT_IN_SR
Severity color coding	A way to color code severity levels so the user can quickly see the SR's severity.	SVC_ENABLE_SEVERITY_COLOR_IN_SR
Knowledge	A list of knowledge articles to help agents find and use the appropriate details.	SVC_ENABLE_KNOWLEDGE_IN_SR
Click to Edit	A way to perform inline editing of records, update records without drilling down, maintain an overview of the SR list pages, and simplify SR data entry.	SVC_ENABLE_CLICK_TO_EDIT

Productivity tools are disabled by default. Here's how you enable them:

1. In the Setup and Maintenance Work area, go to the following:
   - Offering: Service
   - Functional Area: Productivity Tools
   - Task: Manage Global Search Profile Options
2. Search for the profile option code for the productivity tools that you want to add.
3. In the **Profile Values** section for the profile option code, select **Yes** in the **Profile Value** drop-down list.
4. Save the configuration.

Now, you can set up and configure each tool according to your requirements.

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Update the Status List Order

The status list on the Summary Details page shows a list of statuses that can be associated to a service request. The order of statuses displayed in the list depends on their assigned ranking. Here's how you update the status ranking:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Service Request
   - Task: Manage Service Request Status Values
2. Update the **Ranking** column to position the status in the status list according to your requirements.
3. Click **Save and Close**.

How do I use keyboard shortcuts

Administrators can edit keyboard shortcuts for users to manage service requests. You can define keyboard shortcuts in Setup and Maintenance for the following:

- *Button Access Keys* which are buttons and links on service request pages. For example, **Submit**, **Done**, **Apply**, **Response**, **Save and Close**, and so on. The following table lists button access key combinations for the latest versions of supported browsers.

Browser	Operating System	Key Combination	Action
Google Chrome	Linux	Alt+Shift+Key	Click
Google Chrome	Mac OS X	Control+Option+Key	Click
Google Chrome	Windows	Alt+Shift+Key	Click
Mozilla Firefox	Linux	Alt+Shift+Key	Click
Mozilla Firefox	Mac OS X	Control+Key	Click
Mozilla Firefox	Windows	Alt+Shift+Key	Click
Microsoft Internet Explorer 7	Windows	Alt+Key	Set focus
Microsoft Internet Explorer 8	Windows	Alt+Key	Clear or set focus
Microsoft Internet Explorer 11	Windows	Alt+Key	Clear or set focus

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Browser	Operating System	Key Combination	Action
Apple Safari	Windows	Alt+Key	Click
Apple Safari	Mac OS X	Control+Option+Key	Click

The following table lists the keyboard shortcuts that are provided with the applications. Some shortcuts can't be changed.

Action	Keyboard shortcut	Editable
Create Service Request	E	Yes
Save and Continue	V	Yes
Send	D	Yes
Post	T	Yes
Select from Service Request	Q	Yes
Insert Knowledge	W	Yes
Add Team Members	A	Yes
Back	B	No
Cancel	C	No
No	N	No
Save and Close	S	No
Yes	Y	No
Apply	L	No

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Action	Keyboard shortcut	Editable
Done	P	No
Finish	I	No
Next	X	No
OK	K	No

- *Action Commands* which are task actions that you can perform on the service request. For example, create response, add internal note, update the service request milestone, assign a service request to yourself, update, and so on. The keyboard shortcut combination, Alt+Control+Key, can be used for all actions on the user interface. This combination is applicable to both Windows and Mac OS X operating systems. The following table lists the keyboard shortcuts provided with the applications. All action command shortcuts can be changed.

Action	Keyboard shortcut
Add Action Plan	A
Show Keyboard Shortcuts	H
Open Restore Pane	P
Update	B
Assign to Me	M
Launch Cobrowse	L
Copy	C
Delete	D
Forward	F
Get Link	G
Run Queue Assignment	Q

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Action	Keyboard shortcut
Update Service Request Milestones	S
Customer Entry	E
Internal Note	N
Response	R

Keyboard shortcuts have default configurations. You can't create shortcuts, but you can edit some existing keyboard shortcuts. To edit keyboard shortcuts, do the following:

1. In the Setup and Maintenance work area, click the **Tasks** icon.
2. Select **Search**.
3. Search for and select the **Manage Service Request Keyboard Shortcuts** task.
4. On the Manage Keyboard Shortcuts page, select the keyboard shortcut you want to change, and update the key in the **Shortcut Key** column.

   > **Note:** Two things to remember: Keys aren't case sensitive, and no two actions or buttons can have the same keyboard shortcut.

5. Click **Save**.

How do I update a work order?

Update work orders by opening them from Service Requests, or from Work Orders on the Service springboard.

Some work orders might not be updatable for one of the following reasons:

- The work order must be in a scheduled status before it can be updated.
- The work order was created or updated and was submitted to Oracle Field Service, but not yet confirmed. A message is displayed.
- An error was discovered in the Oracle Field Service integration after the work order was created or updated. A message is displayed.
- Oracle Field Service doesn't support updating activities that are scheduled in the past so the work order scheduled date must be in the future.

To update a work order, do the following:

1. Open the work order.
2. Select the work order that you want to update.
3. Update the work order with your changes.
4. Click **Save**.

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A confirmation message is displayed letting you know the change was submitted.

5. Click **Refresh** to see change confirmation. The work order is in read-only mode until the Oracle Field Service application acknowledges the change. This should only take a moment. When the change is confirmed, the Edit Work Order page appears with the change displayed.

6. Click **Save and Close**.

How do I define email templates?

You can create email templates for the Forward, Response, and System Response messages of a service request (SR).

You can create templates using HTML to send email notifications for an SR using Application Composer.

To define an email template:

1. Sign in to the application as an administrator.
2. Navigate to Application Composer.
3. In the **Application** field, select **CRM Cloud** from the drop-down list.
4. In the **Common Setup** region, click **Email Templates**.
5. On the Email Templates page, click the plus icon to create a new template.
6. In the **Object** field, select **Service Request** from the drop-down list.
7. Specify a name for the template.
8. (Optional) Specify a description.
9. To add any attachments, click the plus icon, browse to the file location, and select the file.
10. A template is active by default. To disable the template, clear the **Active** option.
11. Specify the email subject.

    You can use SR field names in the subject. For example, the subject can be `Resolved issue [$Title$]`.

12. Edit the message HTML as required. Add the #MessageContent# tag anywhere in the HTML code. This tag is replaced by the SR message content.

13. (Optional) To enable the display of the email thread, insert the #PastConversation# tag in the template.

    Add this tag within the email body at the place where you want to insert the previous messages from the email thread. When an agent replies to a customer from the Messages tab in an SR, the email thread is displayed.

14. In email templates that are meant for forwarding to internal users, you can include a link to the SR within the template. Include the link in the following format:

    ```
    <Link to company's Fusion Service site>/service/faces/FuseOverview?
    fndGlobalItemNodeId=itemNode_service_service_requests&pSrNumber=<SR Number>.
    ```

    For example, `https://company123.mycompanydomain.com:10616/service/faces/FuseOverview?`
    `fndGlobalItemNodeId=itemNode_service_service_requests&pSrNumber=SR0000029093`.

15. Click **Save and Close**.

Note: When an SR is created, it might be with or without a queue. So it's possible that an email notification is sent before the SR is assigned to a queue. To avoid a blank field value in the email notification, you must not use the **Queue Name** field in your email template.

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How do I enable features and profile options for chat?

You might need to enable the Omnichannel Routing and Chat features to access the profile options.

Enable Omnichannel Routing and Chat features

To ensure your features are enabled, A user with administration privileges should perform the following steps:

1. Navigate to Setup and Maintenance, and select **Service** from the Setup offering page.
2. Click the **Change Feature Opt In** link.
3. Highlight the **Communication Channels** row and click the pencil icon to access the edit view and edit your features.
4. If the Omnichannel Routing feature isn't enabled, check the **Enable** field.
5. If the Chat feature isn't enabled, check the **Enable** field.
6. Click **Done**.

Enable Omnichannel profile options

Once you've confirmed that the Omnichannel and Chat features are enabled, you'll need to configure the following profile options to enable various chat features.

1. In Functional Setup Manager, select **Communication Channels** from the Service offering.
2. In the **Show** drop-down list, select **All Tasks** to ensure all Tasks are displayed.
3. Select the **Manage Omnichannel Profile Options** task.
4. View and edit Omnichannel profile options as needed:

Omnichannel Profile options

Profile Option	Description	Suggested value
SVC_ENABLE_OMNI	Enable the sending of work requests to Omnichannel for assignment to an agent.	Yes
SVC_OMNICHANNEL_BROWSER_ NOTIFICATION_ENA	Used to enable real-time browser notifications.	Yes
SVC_OMNICHANNEL DESKTOP_ NOTIFICATION_ENA	Enable toasts messages to view desktop notifications even when you're not actively viewing the application pages.	Yes
SVC_OMNI_DISABLE_WORK_ITEM_ AVAILABILITY_SELECTION	Disables the option for agents to change their availability to handle work items on the Omnichannel toolbar.	**None** All Chat Non-Real-Time Work

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Enable chat profile options

1. In Functional Setup Manager, select **Communication Channels** from the Service offering.
2. In the **Show** drop-down list, select **All Tasks** to ensure all Tasks are displayed.
3. Select the **Manage Chat Profile Options** task.
4. View and edit Chat profile options as needed:

Chat profile options

Profile Option	Description	Suggested value
SVC_ENABLE_CHAT	Enable the Chat feature to make users available for chat and allow them to receive incoming chat requests.	Yes
SVC_CHAT_OFFER_NOTIFICATION_ TIMEOUT_ VALUE	Specify the seconds that lapse before the chat offer notification is automatically dismissed. The default number is 30 but the dismiss interval can be set between 5 and 285 seconds.	30
SVC_CHAT_TRANSFER_TO_QUEUE_ENABLED	Enable transferring to queue for the Chat agent.	Yes
ORA_SVC_CHAT_TRANSFER_TO_AGENT_ ENABLED	Enable transferring to of a chat to another chat agent.	Yes
ORA_SVC_CHAT_CONFERENCE_WITH_AGENT_ ENABLED	Enable a chat conference between agents.	Yes
SVC_CHAT_ANONYMOUS_ACCESS_ENABLED	Enable chat anonymous access for the end users	Yes **Note:** Set Anonymous Access to **No** if chat is only used for the Help Desk. If it's being used for other applications, such as Service Center, then it should be set to Yes.
SVC_CHAT_INLAYS_ACCESS_ENABLED	Enable access for chat inlays to get the bootstrap configurations.	Yes For more information, see *How do I implement Embedded Service?*
SVC_CHAT_CKEDITOR_ENABLE	Enable the CK Editor for the Chat agent.	Yes

Enable MCA profile options

1. In Functional Setup Manager, select **Communication Channels** from the Service offering.
2. In the **Show** drop-down list, select **All Tasks** to ensure all Tasks are displayed.

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3. Select the **Manage MCA Profile Options** task.
4. View and edit MCA profile options as needed:

MCA profile options

Profile Option	Description	Suggested value
SVC_MCA_SHOW_CONTACT_ON_WRAP_UP	Indicates whether to show the contact information during the wrap up process.	Yes

Configure Call Flow Parameters

Use the Configure Call Flow Parameters task to specify whether a contact must be identified and validated or if a screen pop must be displayed. You can also use these settings to specify when and how a call wrap up must be displayed.

1. In Functional Setup Manager, select **Communication Channels** from the Service offering.
2. In the **Show** drop-down list, select **All Tasks** to ensure all Tasks are displayed.
3. Select the **Configure Call Flow Parameters** task.
4. View and edit MCA profile options as needed:

Call Flow Parameter option values

Profile Option	Description	Suggestion value
Contact Required	Used to require that a chat must have a contact.	Yes
Contact Verification	Used to require that a contact of a chat must be verified.	Yes
Screen Pop	Used to screen pop the appropriate page.	Yes
Wrap Up	Used to present a Wrap Up page to the agent at the end of a chat.	Yes **Note:** Oracle strongly recommends enabling wrap ups for chats if you're using Service Center to prevent the transcript from closing at the end of a chat.

Configure optional profile options

Now, you can review or change profile options accessed by performing the following steps. Note that these usually don't need to be changed.

1. Click the **Tasks** icon in Functional Setup Manager and select **Search**.
2. Type: **Manage Global Search Profile Options** and click **Search**.
3. Select the **Manage Global Search Profile Options** task.

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4. View and configure the profile options listed in the following table:

Chat profile options

Profile Option	Description	Suggested value
SVC_OMNI_REINSTATE_WORK_ITEM_AVAILABILITY	When returning to the supported modules, it automatically reinstates the non-real-time channel availability groups for work Items on the Omnichannel toolbar.	• None • None-Real-Time Work
SVC_CHAT_IDLE_TIMEOUT	The number of seconds after which a chat will be terminated if there's no activity. Zero disables the functionality. Except zero, the minimum value is 300. Default is 600.	600
ORA_SVC_OMNI_BROWSER_INACTIVITY_TIMEOUT	Profile option that allows administrators to set ADS timeout due to inactivity; this can be increased up to 8 hours (480). Change the number of minutes of browser inactivity before work assignment offers will end. The minimum default value is 30 minutes, and the maximum value can be up to 480 minutes.	30
ORA_SVC_OMNI_MARK_UNAVAILABLE_ON_BROWSER_INACTIVITY	Enables the system to mark agent unavailable for work after browser inactivity for the duration specified by ORA_SVC_OMNI_BROWSER_INACTIVITY_TIMEOUT.	No
ORA_SVC_QUEUED_REQUEST_DISCARD_SECONDS	Specify the queue time if no agents are available. If the value is 0, the chat will stay queued until the customer ends the request. The minimum is 120 and the maximum is 1800.	1800
ORA_SVC_OMNI_AGENT_SESSIONS_COUNT_INTERVAL	Change the interval number of minutes to look for other active browser sessions before marking a user offline. The maximum value can be up to 480 minutes.	60
ORA_SVC_MCA_GLOBAL_PRESENCE_ENABLED	Decides whether a customer has opted in for global presence across the application.	Yes **Note:** You can set this profile option at the site level.

How do I enable email notifications to monitor milestones?

You can configure email notifications to warn required teams and managers that a milestone is about to expire, or email notifications can be used to escalate a service request when a milestone expires.

After you set up the scheduled process, you can configure object workflows to perform actions when a milestone's WarnedFlag is set to **Y** or ComplianceFlag is set to **N** (when the milestone expires).

1. Sign in to the application as an administrator.
2. Navigate to **Application Composer** and then click **Common Setup > Email Templates**. The Email Templates page is displayed.
3. Click **Create** to create a new template. The Create Email Template page is displayed.
4. From the **Object** drop-down list, select **Milestone**.
5. Specify the **Name**, **Email Subject**, and **Email Body** for the content of the email you want to send.
6. Click **Save and Close**.
7. After you create the template, Click **Navigator > Configuration > Sandboxes**.
8. Select and enter a sandbox.
9. In **Application Composer** select **CRM Cloud** in the **Application** drop-down list, and then select **Service** as the **Object Tags** option.
10. Click **Object Workflows**. The Object Workflows page is displayed.
11. Click **Create** to create a new object workflow. The Create Object Workflow page is displayed.
12. From the **Object** drop-down list, select **Milestone**.
13. Enter the **Name** and **Description** for the object workflow.
14. Specify the **Event Point** and **Condition** for the milestone object workflow.
    For example, to trigger a workflow action when the `WarnedFlag` is set to **Y**:
    a. For the **Event Point** option, select **When a record is updated**.
    b. In the **Condition** field, enter the following expression:
    ```
    if (isAttributeChanged('WarnedFlag') && WarnedFlag=='Y')
    return true;
    ```
15. Select the action you want to perform as part of the workflow. You can set up **Email Notification** and **Field Updates** for the milestone.
    a. In the **Email Notification** section, click **Create** to add a new notification.
    b. Specify the schedule and addresses to which you want to send the notifications.
    c. Click **Save** to save the milestone object workflow.
16. Republish the sandbox in which you created the object workflow.

You can create a script for specific aspects of the workflow, such as looking up the assignee and assignee manager details for sending the notification. Here's an example script you can use to get the assignee and assignee manager details and populate the **Address** field for the email notification.

```
def resourceVO = newView('Resource')
resourceVO.appendViewCriteria("PartyId = ${AssigneePartyId}")//party id of SR assignee
resourceVO.executeQuery()
def mgrPartyId
while (resourceVO.hasNext()) {
 def curResourceRow = resourceVO.next()
```

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```
 mgrPartyId = curResourceRow.ManagerPartyId
 }
return mgrPartyId
if (mgrPartyId != null) {
def resourceMgrVO = newView('Resource')
resourceMgrVO.appendViewCriteria("PartyId = ${mgrPartyId}")
resourceMgrVO.executeQuery()
def mgrEmailId
while (resourceMgrVO.hasNext()) {
 def curResourceMgrRow = resourceMgrVO.next()
 mgrEmailId = curResourceMgrRow.EmailAddress
 }
return mgrEmailId
}
```

What are action plans?

Action plans are used to complete a series of steps or a sequence of events to resolve different types of requests.

You can associate action plans to service requests if you need to complete a series of steps or a sequence of events to resolve the request .

You can attach action plans to a many objects, such as service request using an administrator-defined template, or by adding individual actions. Actions can be can be required or optional tasks, basic steps such as tasks, or appointments, or more complex steps such as cases, opportunities, or processes. .

Be careful about spacing. This is the Service Center condition. You must remember that each conditioned sentence or phrase won't show in certain output. Here's what I mean.

You can add Action Plans to the following objects:

- Service Requests
- Cases

Agents can add either solo actions, or action plans. Actions can be required or optional tasks, activities, or appointments.

- **Solo Actions** are individual actions added to an object.
- **Action Plans** are added from an administrator-defined template. Action plans are made up of multiple actions.

By using actions and plans, users have:

- A visual aid to see the progress of a solo action or an action plan
- Any warnings on actions or plans

To use the Action Plans feature, set up actions, templates, and categories in Setup and Maintenance.

In Setup and Maintenance, navigate to Service > Action Plan. If Action Plan isn't displayed, use the **Change Feature Opt In** to activate Action Plans.

The following table shows the name and description of each action plan setup task.

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Task	Description	Required
Manage Action Plan Profile Options	Manage profile options for the Action Plans feature.	Yes
Manage Action Plan Actions	Create actions that can be used for solo actions or in action templates. You can specify the category, type, duration, and visibility for each action.	Yes
Manage Action Plan Templates	Create templates to group similar actions to be added to an action plan.	Yes
Manage Action Categories for Action Plans	Action categories are used to facilitate finding actions to add to templates or directly to an action plan.	No
Manage Template Categories for Action Plans	Template categories are used by agents to filter and find templates to apply to an action plan.	No
Manage Mapping of Action Plan Status Values	Manage the global setup for status configuration. You can map task, appointment, or request attributes to an action status at a global level. Action status mapping can also be done at the individual action level.	No
Manage Process Integration for Action Plans	Configure the authentication from Fusion Service to your Process Automation instance. **Note:** Used for the Run Process through Action Plans feature. A subscription to Oracle Process Automation is required in order to take advantage of this feature.	No
Manage Action Plan Process Metadata	Manage the action plan process metadata. **Note:** Used for the Run Process through Action Plans feature. A subscription to Oracle Process Automation is required in order to take advantage of this feature.	No

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Related Topics

- How do I manage Action Plan templates?
- How do I manage action plan actions?
- Map Action Plan Status Values

How do I manage Action Plan templates?

The Manage Action Plan Templates task is used to create or edit templates that include multiple actions that must be completed to close an SR.

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

- Offering: Service
- Functional Area: Action Plan
- Task: Manage Action Plan Templates

Create a New Action Plan Template

To create a new action plan template:

1. Click **Create Template**.
2. Enter a name for the template.
3. Select the type of business calendar for the duration and end dates of the actions.

   > **Note:** The calendar comes from the list of schedules defined on the Subscription Management in the Manage Availability page. For more information about calendars, see the Create a Coverage Schedule topic in this guide.

4. Enter a start date for the template.
5. Enter an end date for the template (optional).
6. Check **Published** to publish the template when it's ready for agents to use.
7. Enter a **Description**.
8. Select a **Category**. Categories are available only if you set them up in the Manage Action Categories for Action Plan task.
9. Select a the **Context** from the list of values. Context values include:

   - Article
   - Case
   - HR Help Desk Request (If you're using the Help Desk offering)
   - Internal Service Request (If you're using the Help Desk offering)
   - Service Request

10. If business units are enabled, select the business unit for the template.
11. If stripe codes are enabled, select the stripe code for the template.
12. Select **Auto Start** to choose the action plan template to start automatically.

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Any Templates with this setting, once assigned using the Action Plan REST API, are started either on the next execution of the action plan scheduled job (Monitor Action Plan Actions), or a REST call to refresh the action plan..

> **Note:** You might need to create the action plan with `Create_&_Initiate` status using the REST API. If you create it using just the Create status, it won't consider it for Auto Start on the REST scheduled job or refresh the REST action call.

13. Add actions to the template by clicking the **Add** icon in the **Action Flow** region of the page.
14. On the **Add Actions to Template** page, search for the action to add by entering a name, category, or action type.
15. Click **Search**.
16. From the search results, add an action by clicking the Add icon for the action you want to add.
17. Now, search and add all the actions you want to place on the template.

> **Tip:**
> - You might not see all actions. Actions can be limited by stripe and business unit.
> - You can delete actions from the **Actions to Add** pane by clicking the delete icon.
> - You can add the same action multiple times. For example, if the action is to obtain approval from two managers, add the action twice.
> - You can reorder actions using the arrow icons.
> - If you can't find an action, you can create actions. Click **Create New Action**.

18. When you've added all the actions you want on the template, click **Add to Template**.

    On the Template page, the actions display in a list view. You can also view the template in a graphical view by selecting the graphic icon.
19. In the **Prerequisite** column, set any prerequisites for each action in the template. Select the action row in the **Prerequisites** column and click the **Add Prerequisites** icon.
20. Select the check box next to the actions that you want to make a prerequisite for the action.

> **Tip:**
> - For actions that have prerequisites, mouse over the prerequisite to show the names of the prerequisite actions.
> - Use the graphical view to see the order of completion for the actions.

21. Actions are automatically set to mandatory in the **Mandatory** column. Deselect the check box to make an action optional.

    If an action is identified as Optional, the agent can skip the action if it doesn't apply to a specific action plan. Mandatory actions can't be skipped.
22. Click **Save and Close** to complete the template.

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Edit an Existing Template

To edit an existing template:

1. In the **Manage Action Plan Templates** task, select the template you want to edit.
2. Make your edits.
3. Click **Save and Close**.

Related Topics
- How do I create a coverage schedule?
- How do I manage action plan actions?
- How do I update existing setup data?

How do I enable multiple Business Units Fusion Service?

To enable multiple business units (BUs) for Service , you must set the following profile options:

1. Multiple Business Units Enabled (HZ_ENABLE_MULTIPLE_BU_CRM): Set this profile option to **Yes**. The default value is **No**.
2. Customer Relationship Management Business Unit Default (HZ_DEFAULT_BU_CRM): Set this to the default business unit for your service application.

> **Note:** You must ensure that the value of the HZ_DEFAULT_BU_CRM profile option doesn't remain blank, and the value is set to a BU. Otherwise, agents might see an error while creating SRs.

To set the profile options for Service BUs:

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

   - Offering: Service
   - Functional Area: Company Profile
   - Task: Manage Common CRM Business Unit Profile Options

   The Manage Common CRM Business Unit Profile Options page shows the two profile options.
2. Click the **HZ_ENABLE_MULTIPLE_BU_CRM** profile option.
3. In the HZ_ENABLE_MULTIPLE_BU_CRM: Profile Values region, set the **Profile Value** for the Site **Profile Level** to **Yes**.
4. Click **Save and Close**.
5. Click the **HZ_DEFAULT_BU_CRM** profile option.
6. In the HZ_DEFAULT_BU_CRM: Profile Values region, specify the **Profile Value** for the Site **Profile Level**.
7. Click **Save and Close**.

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How do I manage resource teams?

This procedure describes how to manage resource teams. A resource team is a temporary group of resources formed to complete a business task. A resource team can't be hierarchically structured and isn't intended to implement an organization.

Create Resource Teams

To create resource teams:

1. Navigate to the Manage Resource Teams UI page as follows: **Navigator** > **Resource Directory** > **Tasks** > **Manage Resource Teams**.
2. Click the **Create** action menu option or button.
   The Create Team page appears.
3. Enter an appropriate team name.
4. Optionally, enter a team description and specify team usage, resource members, and organization members.
5. Click **Save and Close**.

Edit Resource Teams

To edit resources teams:

1. Navigate to the Manage Resource Teams UI page as follows: **Navigator** > **Resource Directory** > **Tasks** > **Manage Resource Teams**.
2. Search for the resource team that you want to edit.
   You can search by entering criteria such as the team name, number, and usage. You can also use the saved searches.
3. Select the resource team you want to edit from the Search Results region and click its name to navigate to the Edit Team page.
4. On the Edit Team page, you can edit the team's details such as the team name, description, usage, resource members and organization members.
5. Click **Save and Close**.

Why can't I find newly created articles, categories, and products in Knowledge Authoring and My Knowledge?

Sometimes newly created articles, categories, and products don't appear in Knowledge Authoring and My Knowledge. To make these missing items available to your knowledge users, you need to run some knowledge scheduled processes and assign locales to knowledge users.

1. Schedule and run the following knowledge processes:
   - Knowledge Content Batch Process: This job updates Knowledge categories and products to reflect recent changes to Service and HCM products and categories. Schedule this job to run only once per day. Running this job more frequently isn't recommended.

- ○ Knowledge Search Batch Process: (Not applicable for Redwood Knowledge, as the search index updates automatically when you publish an article in Redwood Knowledge.) This job updates Knowledge search to reflect any changes to knowledge base content. Schedule this job to run every 15 minutes. The job frequency must not be less than 15 minutes.
2. Assign locales to users. For more information, see *Why can't I create articles in Knowledge Authoring?*

Note: This answer is applicable to both Fusion Service Knowledge Management with Redwood and Classic User Experience.

Note: You need the SVC_SCHEDULE_SERVICE_JOBS_PRIV authorization to schedule Knowledge processes.

To run the scheduled processes:

1. Go to **Tools**, and click **Scheduled Processes**.
2. Click **Schedule New Process**.
3. In the Schedule New Process dialog box, select **Job** as the process type.
4. In the **Name** field, type "Knowledge", and press Enter.
   This displays the list of available Knowledge processes.
5. Select the process you want to schedule and click **OK**. You need to repeat the steps for each of the following processes:
   - ○ Knowledge Content Batch Process
   - ○ Knowledge Search Batch Process (Not applicable for Redwood Knowledge)
6. Click **OK** in the Schedule New Process dialog box to go to the Process Details page for the job.
7. Click **Process Options**, choose the options you want, and click **OK** to return to the Process Details page.
8. Click **Advanced** and for **Run** select **Using a schedule**.
   - ○ For the Knowledge Content Batch Process, set the following:
     - **Frequency**: Daily
     - **Days Between Runs**: 1
     - **Start Date**
     - **End Date**
   - ○ For the Knowledge Search Batch Process (Not applicable for Redwood Knowledge), set the following:
     - **Frequency**: Hourly/Minute
     - **Time Between Runs**: Hours 0 Minutes 15
     - **Start Date**
     - **End Date**
9. Click **Submit**.

How do I add concepts and synonyms?

You can add concepts to the search dictionary. You can also add, update, and delete synonyms for existing concepts.

Note: This answer is applicable to Fusion Service Knowledge Management with the Classic User Experience.

To add concepts and synonyms:

1. Click **Setup and Maintenance** and navigate to the **Knowledge Management Search Dictionary** task.

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2. Click the + symbol in the **Manage Search Dictionary** page.
3. Complete the fields **Concept Name** and **Description**.

> **Note:** You need to add the concept name as a synonym. For example, if you created a concept named "mobile", you also need to add a synonym named "mobile".

4. To add a synonym, click the + symbol in the **Concept Details** window.
5. Enter the **Synonym** name and select the **Language** from the drop-down list and save it.

> **Note:** You can add synonyms only for your active languages.

What are entitlements?

Service entitlements are benefits or privileges you provide to customers when you extend service to them.

A milestone is a type of entitlement that identifies service levels your organization has committed to its customers, and is tracked when providing service in the context of a service request.

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

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

In addition, you can also set up administrator-defined milestones that define other service levels you want to track for your customers.

When you create a service request for a customer, milestones are automatically assigned to the service request based on the defined service coverages. You can apply milestones to a service request by defining the coverages as follows:

- **Standard Coverages**, which act as templates.
- **Default Coverages**, which associate the standard coverage templates with a customer (customer-level default), or specify a standard coverage template as a global default that's applicable to all service requests.
- **Subscription Coverages** (or **Service Contracts**), which you can optionally create to apply coverages only to specific assets or products owned by a customer.

  > **Note:** New customers are automatically opted-in to use Subscription Management instead of Service Contracts. For existing customers implementing service entitlements for the first time, Oracle recommends the use of the subscription coverages. Customers already using Service Contracts are still supported, however new features such as product-based service level agreements (SLAs) are only available with Subscriptions. For more information, see *How do I enable subscription coverages for entitlements?*. When the same milestone exists in coverages at multiple levels, the subscription (or contract) values take priority over customer-level default values, which in turn take priority over global default values.

To apply milestones for specific assets or products, you must set up Subscriptions (or Service Contracts), opt-in to use installed base assets from the common asset model, and allow an installed base asset to be picked on a service request. If you use Subscriptions (or Service Contracts), you specify the standard coverage on a contract line and identify which installed base assets or products are covered. When an installed base asset or product is selected on a service request, contract-based coverages are applied to the milestone determination. When a service request specifies an installed base asset or product that's covered on a subscription (or service contract), that corresponding coverage is automatically considered when applying milestones to the service request.

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> **Note:** For any service requests without a covered asset or product, the existing global and customer default coverages apply.

How do I set up milestones and coverages?

You must set up milestones and coverages so that the ready-to-use milestones are automatically applied to service requests and monitored.

New customers are automatically opted-in to use Subscription Management instead of Service Contracts. For existing customers implementing service entitlements for the first time, Oracle recommends the use of the subscription coverages. Customers already using Service Contracts are still supported, however new features such as product-based service level agreements (SLAs) are only available with Subscriptions. For more information, see *How do I enable subscription coverages for entitlements?*

Here's the steps you require for this set up:

1. Manage milestone configuration (optional)
2. Create a coverage schedule (optional)
3. Create a standard coverage
4. Apply the standard coverage as global and customer defaults
5. Configure the scheduled process to monitor SR milestones
6. Add current milestone fields to the SR layout (optional)
7. Configure email notifications or other event actions from an object workflow (optional)

How do I create standard coverages?

The standard coverage acts as a template that contains entitlement rules, which specify when milestones are due and for what conditions.

For example, high severity service requests may have earlier milestone times, and use a schedule with longer work hours and fewer holidays, than lower severity service requests.

1. On the Subscription Configuration page, click **Entitlements Management > Standard Coverage**.

   The Manage Standard Coverage page is displayed.
2. Create a new coverage and select **Subscription Entitlements** as the **Entitlement Type**.

   The Edit Standard Coverage page is displayed.

   > **Note:** If you're using Service Contracts, then you navigate to this page by clicking **Navigator > Contract Management > Contracts > Tasks > Standard Coverage**. Then select **Contracts Service Entitlements** as the **Entitlement Type**.

3. Select **Actions** > **Add Entitlements** to configure the entitlement rules structure. The **Entitlement Rules** dialog box is displayed.

   Service request severity is automatically included as a condition column. If you want to vary milestones based on the service request channel, optionally, select **Channel Type** as an optional condition column.

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    a. Click **Next**, and select all optional results columns to display all available metrics and thresholds.

    You can optionally select only one of the milestones and its threshold if applicable. For example, if service requests that apply to this coverage shouldn't have a first response milestone tracked, you can deselect **First Response Metric** and **First Response Warning Threshold** from **Optional Results Columns**.

    b. Click **Finish** to apply the entitlement options and complete the configuration of the entitlement rules. The Edit Standard Coverage page is displayed.

4. Add entitlement rules for this coverage.

    a. In the **Entitlement Rules** section, click the **Add Row** icon.

    b. Specify the **Condition Columns** (**Severity**, and if selected, **Channel Type**).

    This row is applied when the service request values match the condition column values specified here.

    The algorithm applying milestones to service requests requires that coverages never have more than one row with condition columns that match the service request. If you leave a condition column value blank, the null value acts as a wildcard, and then is matched against any service request value. While there are valid scenarios where this can be used, it's important to avoid having two lines that could match the same service request.

    The following table shows an example of a valid use of a null value in standard coverage condition columns:

      - In this valid example, a service request with high severity will only match line 1, regardless of the channel.
      - A service request with low severity will only match line 5, regardless of the channel.
      - The medium severity service request can only match one of lines 2 through 4, depending on the channel type.

Line Number	Severity	Channel Type
1	High	Blank
2	Medium	Phone
3	Medium	Email
4	Medium	Chat
5	Low	Blank

    The following table that shows an example of an invalid use of a null value in standard coverage condition columns:

      - This invalid example shows a situation where the medium severity service request with a phone channel matches lines 2 and 4.

- Similarly, a medium severity service request with the email channel matches lines 3 and 4.
- In both cases, the service request won't have any milestones applied because more than one line from a single coverage matches the service request.

Line Number	Severity	Channel Type	Comments
1	High	Blank	
2	Medium	Phone	Medium, Phone would match this line
3	Medium	Email	Medium, Email would match this line
4	Medium	Blank	Medium, Phone would also match this line Medium, Email would also match this line
5	Low	Blank	

To configure the behavior of null values in a coverage, select the **Allow Null** and **Null is Wildcard** check boxes for the selected matrix class. You will find these check boxes on the Edit Matrix Class: Subscription Entitlements page, **Condition Columns** section. For more information about using these properties on condition columns, see the section "Set Up Additional Condition Columns for Standard Coverage Entitlement Rules".

c. Specify the **Result Columns** (**Calendar**, along with the metric and threshold values for each milestone).

   i. From the **Calendar** drop-down list, select the coverage schedule to use for calculating the milestones' due date.
   ii. For each milestone, enter the metric in minutes, which is used with the schedule to identify when the milestone is due.
   iii. Enter the corresponding threshold value in minutes. This threshold specifies the number of minutes before expiration that the milestone's `WarnedFlag` is set to **Y**.

d. Click **Save**.
e. Optionally, you can add multiple entitlement rules to a standard coverage.

Each entitlement rule row is checked against the service request values, and if a service request matches all condition column values, that rule's milestone results (values and schedule) are used to calculate the milestone due date.

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How do I create a coverage schedule?

To create your own coverage schedule calendars with the intervals and holidays specific to your business, do the following:

1. Sign in to the application as a sales administrator.
2. On the **Navigator**, click **Subscription Management**.
   The Subscriptions page is displayed.
3. Click **Subscription Configuration**.
   The Subscription Configuration page is displayed.
4. To create a coverage schedule, click **Entitlements Management > Manage Availability**.
   The Manage Availability page is displayed.

   > **Note:** If you're using Service Contracts, then you navigate to this page by clicking **Navigator > Contract Management > Contracts > Tasks > Manage Availability**.

5. (Optional) To add the holidays, nonworking times, or extended working hours that are applicable to the coverage schedule, click the **Exceptions** tab.
   a. Click **Create** in the **Exceptions** pane to create a new coverage schedule exception, or select an existing entry and click **Duplicate** to copy and update it.
   b. In the **Availability Exceptions** section, click **Add Event**.
   c. Enter the name of the exception event, the date and times of the event, and the availability during the event.
   d. Click **Save**.
   e. (Optional) To delete an exception, click **Delete** in the **Exceptions** pane.
6. On the **Schedules** tab, click **Create** in the **Schedules** pane to create a new coverage schedule, or select an existing entry and click **Duplicate** to copy and update it.
7. Specify the following details:
   - **Schedule Name**: Name of the coverage schedule.
   - **Time Zone**: Time zone for which you're creating the coverage schedule.
8. In the **Date Intervals** section, create a coverage schedule interval with details of when the coverage schedule starts, ends, and the days of the week that are part of the interval.
   - **Start Date** and **End Date**: Start and end dates for the coverage schedule interval.
   - **Availability**: Working days, hours, and times, and break times for the selected days.
9. (Optional) To include exceptions in the coverage schedule, select an exception from the **Exceptions** drop-down list.
10. (Optional) To delete a schedule, click **Delete** in the **Schedules** pane.
11. Click **Save**.

You can create multiple coverage schedules and use them as needed in the standard coverage templates. For example, you might have a high severity service request milestone worked using a **24 by 7** schedule, but a lower severity service request milestone might use a different schedule that's only worked during normal business hours. For more details about using coverage schedules in standard coverages, see the "Create Standard Coverages" topic.

ORACLE

How do I create default coverages?

You use default coverage to apply a standard coverage template to specific customers, or globally to all customers.

When a service request is evaluated to assign milestones, the application considers all global coverages, and customer default coverages setup for the customer specified on the service request. If a milestone is applicable from both a global default and a customer default coverage, the application uses the customer default coverage values over the global defaults.

1. On the Subscription Configuration page, click **Entitlements Management > Default Coverage**.

   The Manage Default Coverage page is displayed.

   > **Note:** If you're using Service Contracts, then you navigate to this page by clicking **Navigator > Contract Management > Contracts > Tasks > Default Coverage**.

2. Click **Create** to add a new coverage.
3. Select the **Default Level** for the coverage:

   o Select **Global** to assign the coverage to all customers.

     Then select the standard coverage in the **Coverage** column that you want to apply to all customers.

   o Select **Customer** to assign the coverage to a specific customer.

     Then select the customer in the **Default Level Value** column, and then select the standard coverage in the **Coverage** column that you want to apply to that customer.

4. Enter the start and end date for the coverage.
5. Click **Save**.

How do I change acknowledgment messages for inbound email?

When you receive an email from your customer or an employee to open a service request, an acknowledgment message is sent to them automatically. Based on your company's requirement, you can change the predefined acknowledgment messages provided by the application.

> **Note:** You can't add new tokens to these messages. Only the predefined tokens are used in these messages.

For CRM, the following predefined messages are provided:

- SVC_EMAIL_ACK_FOR_KNOWN_CUST
- SVC_EMAIL_ACK_FOR_MULTI_CUST
- SVC_EMAIL_ACK_FOR_UNKOWN_CUST

ORACLE

To change the acknowledgment messages that you send out to your customers or employees when you receive an inbound email:

1. In the Setup and Maintenance work area, go to the **Tasks** panel tab.
2. Click **Search** from the list of displayed tasks.
3. In the **Search** window, enter Manage Messages.
4. Click the **Manage Messages** task that's displayed.
5. In the **Manage Messages** window, in the **Message Name** field, enter `%SVC%ACK%`.
6. From the list of acknowledgment messages displayed, select the message that you want to edit and click **Edit**.
7. In the **Edit Message** window, navigate to the **Message Text** region.
8. Edit the **Short Text** and **User Details** the way you want.
9. Click **Save**.
10. To translate the changed messages, click **Translation Editor**.

    The **Edit Translations** window displays the list of available languages for translating the messages.

    > **Note:** Inbound email can't detect the language. So it always uses the default language for your deployment.

11. Select a row and click in the **Short Text** field.
12. In the **Short Text** window, edit the message and click **OK**.
13. Click in the **User Details** field, edit the text, and click **OK**.
14. Select another row and repeat the same steps to edit the messages for all the available languages.
15. Click **OK** in the **Edit Translations** window to save the changes.
16. Click **Save and Close** in the **Manage Messages** window.

What are the SR profile options?

Service request profile options let you configure and control application data. Administrators and setup users can manage SR profile options in the Setup and Maintenance work area.

You can set various profile options and schedule job processes for service requests. Some profile options must be used along with job processes to achieve the results you want. For example, after setting the profile value for closing a resolved SR after N number of days, schedule a job process that closes SRs.

The following table describes the various profile options for service request management. For more information on scheduled processes, see *What are scheduled processes?*

Profile Option	Description
SVC_ASSIGN_TO_QUEUE_ON_CREATE	Assigns an SR to a queue automatically, when the SR is created. **Note:** The preferred way of assigning an SR to a queue is by using Omnichannel assignment. If Omnichannel is enabled, this profile option is ignored.
SVC_SR_IN_RESOLVED_DAYS	Defines the number of days after which any resolved SR is automatically closed. This profile option must be used along with the *Auto-Close Service Requests* job process. Make sure the following two conditions are met:

Profile Option	Description
	• The SVC_SR_IN_RESOLVED_DAYS profile value must be set to 1 or greater for the Auto-Close Service Request job to run. • The SVC_SR_IN_RESOLVED_DAYS profile value must be set to 0 to disable the Auto-Close Service Request job.
SVC_SR_IN_WAITING_DAYS	Defines number of days for which a service request must be in Waiting status before the SR is auto resolved. This profile option must be used along with the *Auto-Close Service Requests* job process. Make sure the following two conditions are met: • The SVC_SR_IN_WAITING_DAYS profile value must be set to 1 or greater for the Auto-Close Service Request job to run. • The SVC_SR_IN_WAITING_DAYS profile value must be set to 0 to disable the Auto-Close Service Request job.
SVC_AUTO_CLOSED_STATUS_CD	Defines the status code to use for auto-closing service requests that have been in Resolved status for at least the number of days specified by SVC_SR_IN_RESOLVED_DAYS. This profile option must be used along with the *Auto-Close Service Request s* job process.
SVC_AUTO_RESOLVED_STATUS_CD	Defines the status code to use for auto-resolving service requests that have been in Waiting status for at least the number of days specified by SVC_SR_IN_WAITING_DAYS. This profile option must be used along with the *Auto-Close Service Requests* job process.
SVC_PUID_FORMAT	Defines the format for the unique reference number on each SR. Every SR number consists of a prefix and radix. Let's say that you select SR_ as the prefix and No alphanumeric conversion as the radix. Without this formatting profile option, the SR numbers are generated as SR_1, SR_2, and so on. Now suppose you use this formatting profile option and the value is 000000. Then the SR numbers are generated as SR_000001, SR_000002, and so on. For more information about configuring the prefix and radix, see *How do I configure the prefix and radix?* > **Note:** > The SVC_PUID_PREFIX profile option used earlier no longer exists.
SVC_SR_DEFAULT_SEVERITY_CD	Sets the default Severity value for a new SR. You can also set this value as blank, if you want the SRs to be created without a Severity value.
SVC_SR_DEFAULT_STATUS_CD	Sets the default Status code for a new SR.
SVC_SR_IN_DELETED_DAYS	Defines the number of days after which a deleted SR is purged. Although a soft deleted SR is in the database, it can't be retrieved or updated from the UI or REST APIs. Once purged, SRs are completely removed from the database. This profile option must be used along with the *Purge Deleted Service Requests* job process to purge SRs. When a soft-deleted SR created from an inbound email is purged, all data associated with that SR is also purged from the inbound message tables.
SVC_INBOUND_ENABLE_FAILED_ MESSAGE_PURGE	Enables or disables purging of inbound messages that fail or aren't processed successfully. When the value is set to Yes, the purge job deletes the records corresponding to such messages from the inbound message tables.

ORACLE

Profile Option	Description
ORA_SVC_ENABLE_DOWNLOAD_ ATTACHMENT	This profile option has two settings. Yes (default) and No. If the profile option is set to Yes, attachments are allowed to be downloaded. To prevent users from being able to download attachments from a Service Request and a Service Request Message, do the following: 1. Set the ORA_SVC_ENABLE_DOWNLOAD_ATTACHMENT profile option value to **No**. 2. Copy the Service Request Troubleshooter role. 3. Copy the Customer Service Representative role. 4. Edit the custom Service Request Troubleshooter role and delete the Download Attachment of an SR or SR Message privilege. 5. Edit the custom Customer Service Representative role and delete the three Service Request Troubleshooter roles and add the custom Service Request Troubleshooter role. 6. Add the custom Customer Service Representative roles to the users who should not be allowed to download attachments.
SVC_EVENT_HISTORY_DAYS_TO_KEEP	Specifies the number of days for which the SR event history details such as update and create must be retained. The data beyond this value is purged.
SVC_INBOUND_MSG_RETENTION_DAYS	Specifies the number of retention days for successfully processed inbound messages. After the specified number of retention days, the successfully processed inbound messages are deleted from the inbound message tables.
SVC_ENABLE_MESSAGE_CORRECTION	Enables you to edit the text of the Internal Note and Customer Entry SR messages that you've previously created and posted.
SVC_ ENABLE_ SEVERITY_ COLOR_IN_SR	Enables the color code for the service request severity set up in the Manage Service Request Severities task, if set to Yes. The task Manage Service Request Severities enables you to add different severity levels for service requests and define different colors.
ORA_ENABLE_QUEUE_MEMBER_ NOTIFICATIONS	Enables selecting all queue members as notification recipients, on the Notification Preferences page. Performance might be impacted if you have many queue members and use this option. Default value is No.
ORA_SVC_DELETE_CLOSED_SR_ ENABLED	Enables automatic deletion of an SR that has been closed for at least the number of days specified by the ORA_SVC_CLOSED_SR_RETENTION_DAYS profile option. This profile option must be used along with the Delete Closed Service Requests job process.
ORA_SVC_CLOSED_SR_RETENTION_DAYS	Defines the number of days for which a service request must remain closed before it's deleted. Deletion can't be undone. This action is applicable only when the Delete Closed Service Requests Enabled profile option is set to Yes. This profile option must be used along with the Delete Closed Service Requests job process.

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What are the Service Request Managements scheduled processes?

You can set various profile options and schedule job processes for service request (SR) management.

You must use some profile options along with the job processes to achieve the results you want. For example, when you set the profile value for closing a resolved SR after N number of days, also schedule a job process that closes SRs. Run scheduled processes to manipulate a set of records for a specific business need, or to get printable output with information about certain records. Some processes do both, for example, to import records and provide a report about them.

Here's a table that describes the job processes you can schedule to manage SRs. For more information about SR scheduled processes, see the Understanding SR Scheduled Processes guide on Help Center.

Job Process Name	Description
Auto-Close Service Requests	Closes service requests that were resolved some days ago, and resolves service requests that have been in waiting status for some days. The number of days for both the scenarios is set using the SVC_SR_IN_RESOLVED_DAYS and SVC_SR_IN_WAITING_DAYS profile options respectively. **Note:** When an SR is closed by this job process, the Status field on the SR can be audited.
Purge Deleted Service Requests	Purges service requests and their child records that were deleted some days ago. The number of days is set using the SVC_SR_IN_DELETED_DAYS profile option.
Purge Inbound Messages	Purges the successfully processed messages from the inbound message database tables, based on the retention days specified in the SVC_INBOUND_MSG_RETENTION_DAYS profile option. If the SVC_INBOUND_ENABLE_FAILED_MESSAGE_PURGE profile option to set to Yes, this job also purges inbound messages that failed or weren't processed successfully.
Load and Update Cloud Metrics for Service	Performs incremental loading and updating of usage and business metrics that are targeted to cloud usage patterns.

Service Request Queue Assignment	Assigns queues to service requests. This job takes the following parameters:
	
	 • Work Object Code: Indicates business objects that get assigned to agents, such as, service requests.
	
	    Expected Value: ORA_Service_Request_Work_Object
	
	 • Candidate Object Code: Indicates objects that are the possible pool of assignment candidates, such as queues.
	
	    Expected Value: ORA_Queue_Candidate_Object
	
	 • Assignment Mode (List of Values: Classification, Matching, Scoring, Territory): Indicates the type of assignment processing. Matching is the only mode that's supported.

ORACLE

Job Process Name	Description
	• View Criteria Name: Indicates the view criteria used to identify the service requests to be assigned. 　Expected Value: `OpenSRsUnassignedToQueueByStripeCd` • Bind Variable: Indicates the bind variables required for the view criteria. 　Expected Value: `BindStripeCd=ORA_SVC_CRM` • Metrics Logging Interval (default value is 100): Indicates the number of work objects in a subprocess before logging assignment metrics, such as update metrics after processing 100 SRs. This is used if your object support Enterprise logging for assignment. • Diagnostic Mode (checkbox): Indicates if the process must be run in diagnostic mode to view the details of assignment processing in an output log. **Note:** The preferred way of assigning an SR to a queue is by using Omnichannel assignment.
Service Configuration Setup	Schedules service setup jobs, such as metrics. This job must be run once during implementation. Ensure that you run this job before you create service requests.
Aggregate Service Requests	Enables querying service request data for reporting, using the CRM - CRM Service Request Summary subject area. The recommended frequency for running this job is one hour. **Note:** If you need faster data refreshes, increase the frequency. However, this impacts the performance of the transaction system.
Monitor Service Request Milestones	Ensures that the service request and milestone status are up-to-date and sends an email notification if compliance issues or warning flags are found.
Purge Service Event History	Evaluates the processed records and retains the data for the days specified in the profile option SVC_ EVENT_HISTORY_DAYS_TO_KEEP, while it purges the rest. The recommended frequency for running this job is daily.
Monitor Action Plan Actions	Evaluates the status of an action plan. The recommended frequency for running this job is 15 minutes. **Note:** If you need faster data refreshes, increase the frequency. However, this impacts the performance of the transaction system.
Execute Incremental Load of Cross-Channel Interaction Data for Reporting	Incrementally loads cross-channel interaction data, for reporting using the CRM - CRM Interaction Aggregate subject area. You must run this job daily to load and update the new data everyday.
Execute Full Load of Cross-Channel Interaction Data for Reporting	Fully loads cross-channel interaction data, or refreshes the data based on a particular date, for reporting using the CRM - CRM Interaction Aggregate subject area. This is an on-demand job. You must run this job in the following scenarios:

ORACLE

Job Process Name	Description
	• The first time data is loaded. • Any time the data needs to be refreshed from a specific date.
Refresh Service Categories for Reporting	Generates the service category hierarchy and stores it in the SVC_CATEGORIES_CF table in a flattened form for ease of reporting. Service category attributes in all service request subject areas obtain data from this table. This process needs to be scheduled to pick up changes to the service category hierarchies to ensure correct reporting. The recommended frequency for running this job is 1 hour.
Migrate Service Business Unit Data	Migrates the following business objects from one business unit (BU) to another: • Category • Channel • Milestone Configuration • Service Request
Execute Incremental Load of SR Audit Data for Reporting	Incrementally loads service request audit data added because the previous run of the process. Use this job to create business intelligence reports using the Service - CRM Service Request Lifecycle subject area. The recommended frequency for running this job is hourly.
Unlock Scheduled Process that Incrementally Loads SR Audit Data	Removes the process lock created by the **Execute Incremental Load of SR Audit Data for Reporting** scheduled process, when that process fails to remove its lock automatically. This process should be run only if the **Execute Incremental Load of SR Audit Data for Reporting** scheduled process is unable to start, and no other instance of that process is currently running.
Purge Obsolete User Preferences	Removes the user notification preferences data of invalid users, in case the resources leave your company or are no longer active. This scheduled process lets your organization ensure that your data on user notification preferences isn't stale.
Purge Obsolete Notification Followers	Removes inactive and end-dated users from following the service request, so that the application doesn't get overloaded with stale data. This scheduled process lets you evaluate whether a resource is still valid and enabled to follow specific service requests.
Delete Messages from External Email Applications	This scheduled process deletes inbound email on the Exchange Server.
Delete Closed Service Requests	This scheduled process deletes closed service requests which have been closed for at least the number of days specified by the ORA_SVC_CLOSED_SR_RETENTION_DAYS profile option.

closeCommEvent

The toolbar calls this method when communication ends. The parameter reason is used to indicate how the communication ended and provide more information. Value reason values are shown in the following list:

- ABANDONED: Indicates that the customer ended the communication before the agent accepted and before timeout.

- CANCELED: Mark outbound call for which the communication started, but subsequently was canceled by the agent before it was answered by the customer.

- ENDCOMMUNICATION: Indicates that the communication ended and if Service Center is in wrap-up mode it then must close the wrap-up page.

- MISSED: The communication attempt couldn't be established for another reason.

- REJECT: When an agent rejects a communication.

- TIMEOUT: The communication attempt timed out.

- WRAPUP: Displays the Wrap Up window to indicate to the agent that the communication must come to a close.

Here's the parameters for this method:

Parameter	Description
channel	The name of the channel for which the method is called. For more information on what channels are available, see *Channel Type Data*.
appClassification	The name of the application classification defined for the current toolbar. If this parameter is passed as null, it's assumed that there's no application classification. For a list of preconfigured values, see *Application Classification Code*.
eventId	Toolbar generated media event identifier. The same parameter value must be used for all method invocations for a communication. This parameter is stored with internal interaction record.
inData	An object containing information about incoming events for customer identifiable data, along with attributes containing the names of system or user-defined defined tokens.
reason	ABANDONED, CANCELED, ENDCOMMUNICATION, MISSED, REJECT, TIMEOUT, OR WRAPUP.
callback	Returns results to the caller toolbar.
channelType	The type of channel for which the method is being called. Note that if, for example, the channel is PHONE but the channelType isn't provided, the default value is set to ORA_SVC_PHONE. For more information, see *Channel Type Data*.

Here's the member attributes of the response object. The object has no return value.

Member Attribute	Description
result	The server side running status. Result values are success or error.
outData	Represents an object containing possible identified data from Service Center for the contact or for the organization. This attribute contains the names of system tokens.
error	Contains the error message if the result value is an error. If not, then the value is undefined. For more information about error message codes, see Error Messages.

Here's sample code for this method:

```html
<html>
<head>
<script type="text/javascript" src="http://domain:port/ora_support/js/mcaInteractionV1.js">
</script>
<script type="text/javascript">
function closeCommEvent() {
 var inData = {};
 inData.SVCMCA_ANI = '5551234';
 inData.SVCMCA_CONTACT_ID = '1234567890';
 inData.SVCMCA_CONTACT_NAME = 'John Smith';
 svcMca.tlb.api.closeCommEvent('PHONE', 'ORA_SERVICE', '12345-1234-67890', inData, 'WRAPUP', function
 (response) {
 if (response.result == 'success') {
 alert('Success! Call ended.');
 } else {
 alert('Operation finished with error: ' + response.error);
 }
 },'ORA_SVC_PHONE');
 }</script>
</head>
<body>
<input type="button" value="End call" onclick="closeCommEvent()"/>
</body>
</html>
```

How do I set notification preferences?

The Notification Preferences page enables administrators to configure the notification rules. Users who have the ORA_SVC_SR_ADMINISTRATOR or ORA_SVC_SR_POWER_USER duty roles can access this page.

Notification preferences are used to select multiple recipients like team members, queue members, and so on. When notification preferences is used, it will override the recipients that are set in the Groovy code.

Here's how you configure the notification rules:

> **Note:** Ensure that your triggers are published.

1. Sign in to the application as an administrator.
2. In the **Navigator**, click **Tools > Notification Preferences**.

    The Notification Preferences page is displayed.

3. From the **Object** drop-down list, select **Service Request** or **Work Order** .

> **Note:** Other supported objects are also displayed in the **Object** drop-down list.

   a. Click **Add**. A blank row is added in the table.
   b. To enable the notification trigger, select **Yes** from **Enabled** drop-down list.
   c. To prevent users from personalizing this notification through the User Notification Preferences page, select **No** from the **OverrideFlag** drop-down list.

   > **Note:** To clean up the user notification preferences data, in case the resource leaves your company or is no longer active, run the **Purge Obsolete User Preferences** scheduled process. This scheduled process lets your organization ensure that your data on user notification preferences isn't stale.

   d. Select a Groovy notification trigger from the **Triggering Event** drop-down list.
   e. Enter the **Notification Name** and **Description**.
   f. In the **Recipients** column, click **Edit**.

   The **Configuration for Trigger Name** dialog box is displayed.
   g. Select the notification delivery options for the respective recipients.

   For an enabled triggering event, notifications are sent to the specified recipients only if you select at least one delivery option. If any delivery method is selected for a specific recipient, that recipient will also receive bell notifications. Also, if you don't select the **Bell Notifications** option, then no notifications will be sent to the specified recipients.

   The following tables describe the recipients and delivery options for the service request object:

Recipients for Service Request Object	Delivery Options for Service Request Object
- **Assigned To**: Resource to whom the service request is assigned. - **Manager of Assigned To**: Manager of the resource to whom the service request is assigned. If a service level agreement is about to expire, and immediate attention is required, the manager of the resource to whom the service request is assigned, can be informed. - **Resource Team**: Extra resources that have been added to a service request on the Team subtab. If you've a team of resources collaborating on a service request, and a trigger such as the service request escalating to Critical status happens, the entire team can be informed.	- **Bell Notifications**: Sends a bell notification to the web application. - **Mobile Notifications**: Sends a mobile push notification to the Oracle Fusion Cloud Mobile application. - **Browser Notifications**: Sends a real-time notification to the desktop of the selected users that are signed in the Omnichannel toolbar, when a predefined trigger is executed. - **Email Notifications**: Sends an email notification to the selected internal recipients' primary work email ID saved in the application. **Note:** The from email address is configured through the SVC_OUTBOUND_EMAIL_ FROM profile option. If that isn't specified, the default from email address `noreply@oracle.com` is used.

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Recipients for Service Request Object	Delivery Options for Service Request Object
- **Queue Owner**: Owner of the queue. If your organization uses manual assignment, the queue owner can be notified when a new service request is associated with a queue owned by the queue owner. For information about the setup steps required to send a notification to a queue owner, see the "Trigger a Notification to the Queue Owner" section. - **All Queue Members**: Send defined notifications to all members of a specified queue, so that they can effectively monitor the queue for open items. Queue notifications reduce the need for agents to manually check each queue they're associated with, to see whether there's new work. To enable this recipient option, set the profile option ORA_ENABLE_QUEUE_MEMBER_NOTIFICATIONS to **Yes**. This profile option is disabled by default. You should only enable this option if your queues have a few participants. If your organization's queues have many members, enabling notifications to all of them might affect application performance.	

The following tables describe the recipients and delivery options for the Work Order object:

Recipients for Work Order Object	Delivery Options for Work Order Object
- **Assigned To**: Resource to whom the work order is assigned. - **Created By**: The user who created the Work Order	- **Bell Notifications**: Sends a bell notification to the web application. - **Browser Notifications**: Sends a real-time notification to the desktop of the selected users that are signed in the Omnichannel toolbar, when a predefined trigger is executed.

ORACLE

Recipients for Work Order Object	Delivery Options for Work Order Object
- **Field Service Resource ID**: The resource ID being used to complete the work order - **Last Updated By**: The user who last updated the work order. - **Manager of Assigned To ID**: Manager of the resource to whom the work order is assigned. If a service level agreement is about to expire, and immediate attention is required, the manager of the resource to whom the work order is assigned, can be informed. - **Requested By**: The user who reported this work order.	- **Email Notifications**: Sends an email notification to the selected internal recipients' primary work email ID saved in the application. **Note:** The from email address is configured through the SVC_OUTBOUND_EMAIL_ FROM profile option. If that isn't specified, the default from email address `noreply@oracle.com` is used.

h. To let users follow a specific service request and receive all notifications for that service request, select the **Enable Followers** check box.

When enabled, users with the correct permissions will see the **Follow** option in the **Actions** menu of the Service Request Details page.

The notification followers receive notifications for all supported channels, when any notification event is triggered for the service requests they follow.

To enable this feature for the site, set the ORA_ENABLE_FOLLOW_NOTIFICATIONS profile option to **Yes**.

To follow a service request, users must have the SVC_GET_SR_FOLLOW_NOTIFICATIONS permission. This privilege is added to the following ready-to-use duty roles:

- Service Request Administrator
- Service Request Channel User
- Service Request Contributor
- Service Request Power User
- Service Request Troubleshooter

Note: To evaluate whether a resource is still valid and enabled to follow specific service requests, run the **Purge Obsolete Notification Followers** scheduled process. This scheduled process removes inactive and end-dated users from following the service request, so that the application doesn't get overloaded with stale data. This scheduled process lets your organization ensure that your data on notification followers isn't stale.

i. Click the **New SmartText** link and enter the **Notification Text** for the selected object.

For more information about using SmartText, see the "Using SmartText" topic.

4. (Optional) To delete a notification preference, select the row and click **Delete**. The associated notification text is also deleted.

Note: If you delete a notification that uses a Groovy notification trigger, you can create a new notification using the same trigger, if no other notification uses it.

5. (Optional) To change an existing notification text, click the **Update SmartText** icon for the selected row.
6. Click **Save**.

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	• 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. • Assignment Manager continues to assign work items to the queue without assigning an agent (just like in a manual queue). • Any unassigned work items in the queue remain unassigned.	• Delete any assignment rules associated with the queue. • Manually assign any unassigned work items in the queue.
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	• Existing work items in the queue at the time of the change aren't routed automatically. • Any new work items that come into the queue are routed automatically.	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.

How do I define notification triggers?

Here's how you define a Groovy script for a notification trigger:

1. Sign in to the application as a setup or administrator user.
2. Click **Navigator > Configuration > Sandboxes**.
3. Create a sandbox or select an existing one, and click **Enter Sandbox** to activate the sandbox. Your sandbox is activated, and you can see its name on the sandbox bar over the global header.
4. In the **Navigator**, click **Application Composer**. The Application Composer page is displayed.
5. Select **Objects > Standard Objects > Service Request > Server Scripts** . The **Server Scripts Service Request** section is displayed.

6. Click the **Triggers** tab.
7. From the **Action** menu, click **Add**. The **Create Object Trigger** section is displayed.
8. Create a Groovy trigger:
    a. Specify the **Name**, **Error Message**, and **Trigger Definition** details.
        - Oracle recommends you to use the trigger type **After Changes Posted to Database**. This trigger type enables you to stop potential issues if the Groovy script is accidentally written to run indefinitely. If the trigger type is set to **Before Update to Database**, with a bad script, there may be some issues.
        - If you're creating a new object, and you want to trigger a notification when the object is created, Oracle recommends you to use the trigger type **Before Insert to Database**. However, some of the **Before** trigger types don't have all attributes exposed yet, resulting in some fields being blank. To debug your triggers if you're not getting the expected results, follow the steps in the section "Debug Groovy Triggers".
        - The `isAttributeChanged()` function works only for the **Before** trigger types. The workaround for the **After** trigger types involves retrieving the old value before the database is updated, then retrieving the new value after the update, and then comparing the two values to see whether the attribute is changed. However, this workaround works only for high-level attributes such as `CriticalFlag` and `status`. This workaround may not work for the `ViewRow` attribute, for example, when you're retrieving the team from an SR.

        When you create a Groovy script, you need the API names of the fields you're trying to access. To create your triggers based on parent/child fields, do the following:
        i. In the **Trigger Definition** section, click **Show/Hide Expression Palette**.
        ii. Click the **Fields** tab.
        iii. Select an **Object**.
        iv. Click the **Maximize Edit Script** arrow. The fields for the selected object are displayed.
        v. Select the API you want, and click **Insert**.
        vi. To close the expression palette, click the **Restore Edit Script** arrow, and then click **Show/Hide Expression Palette**.
    b. Click **Save and Close**.
9. Navigate to the Notification Preferences page to configure your preferences for the notifications.

    For more information about configuring notification preferences, see the "Set Notification Preferences" topic.

    > **Note:** You can reuse a Groovy notification trigger if no other notification uses it.

How do I set up groovy notification triggers?

As an administrator, here's how you configure notifications after you've enabled the notifications feature:

1. Define notification triggers as Groovy scripts in **Application Composer**, containing the conditions that must be met for each notification. Notifications are triggered when the defined conditions are met. For example, a trigger can be defined to send a notification when a high severity SR has been assigned to an agent.

    For more information about defining notification triggers, see the "Define Notification Triggers" section.

ORACLE

2. Configure the notification preferences using the Notification Preferences page. For example, to specify the notification message using SmartText, and the notification recipient.

   For more information about notification preferences, see the "Set Notification Preferences" section.

> **Note:**
> - You can temporarily disable all notifications using the profile option SVC_DISABLE_BO_NOTIFICATIONS. Oracle recommends to use this option when you're doing a bulk import of data, so that you don't get multiple notifications.
> - You can temporarily enable or disable specific notifications from the Notification Preferences page.

How do I enable notifications?

A notification is an alert for users such as service agents and managers, to notify them about an event on the service request, and enable them to take the necessary actions.

As a prerequisite, to allow users to view notifications, you must enable a profile option.

Enabling notifications is a global setup and feature opt-in step. Here's how you enable the notifications feature for service requests:

1. Sign in to the application as a setup or administrator user.
2. Navigate to **Setup and Maintenance**.
3. Select the **Service** offering.
4. In the **Functional Areas** section, select **Change Feature Opt In**.
5. Select the **Enable** check box for in the **Productivity Tools** row.

   When the **Notifications** feature is enabled, bell notifications are automatically enabled for service requests.
6. Click the **Edit** icon in the **Features** column of the **Productivity Tools** row.
7. Enable your required notification delivery channels:

   ○ To enable push notifications for mobile devices, select the **Enable** check box for **Mobile Notifications**.

   ○ To enable browser notifications, select the **Enable** check box for **Browser Notifications**.

   ○ To enable email notifications, select the **Enable** check box for **Use Email as a Notification Delivery Channel**.
8. Click **Done** on the Edit Features Productivity Tools page.
9. Click **Done**.

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.

ORACLE

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.

How do I enable tagging of service requests?

The Tag field isn't displayed automatically on some pages, such as for service requests (SRs). The Tag field is predefined, but it's not added to any of the predefined standard layouts.

Let's say you want the **Tag** field to be available to all users. Then you must add this field to your administrator-defined layout and publish it.

If tags are enabled and exposed, users can create their own tags. Tags aren't striped by business unit. So all tags are visible to all users.

Let's look at an example of how to enable tags so that the **Tag** field is displayed when creating or editing SRs:

1. Modify the corresponding page layout in Application Composer by adding the **Tag** field to the Service Request Summary page.

   For more information about modifying page layouts, see the Extend Application Pages chapter in this guide.
2. Publish the sandbox.

Tags are now enabled and the **Tag** field is available. Anyone who has the Edit Service Request privilege can add a tag.

Create Predefined Tags

As an administrator, you have the option to create predefined tags that are visible to the users. Users can also create tags at runtime to suit their needs.

Again, let's look at a service request example. Based on common requirements, you can create tags such as performance and setup. You can then send a notification to the agents suggesting that they use these predefined tags. For example, for service requests related to performance, use the `performance` tag.

ORACLE

To create an administrator-defined tag:

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

   - Offering: Service

   - Functional Area: Productivity and Tools

   - Task: Manage Tags

   The Manage Tags page is displayed, and it shows the list of existing administrator-defined tags and user-defined tags.
2. Click **Create**.
3. In the **Create Tag** dialog box, specify a tag name in the **Tag** field.
4. Click **Save and Close**.

The new tag appears on the Manage Tags page.

Import and Export Tags

You can export the administrator-defined tags from your test environment to your production environment by using the import-export feature in Functional Setup Manager. User-defined tags can't be imported and exported. Many tags may be created for testing in the test environment, but it's not required to migrate all the tags to production.

For more information about importing and exporting setup data, see the *Oracle Applications Cloud Using Functional Setup Manager* guide.

If you export your setup data by using an Implementation Project, then the administrator-defined tags are exported with the rest of the tasks in the Implementation Project in the following cases:

- Your Implementation Project includes the **Productivity Tools** Functional Area.

- You explicitly include the **Manage Tags** task.

Delete Tags

You can delete tags that are no longer required. For example, tags with typos. When you delete a tag, it's removed from all the associated records and is then deleted.

Let's look at an example of deleting a tag for service requests:

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

   - Offering: Service

   - Functional Area: Productivity Tools

   - Task: Manage Tags

   The Manage Tags page is displayed, and it shows the list of existing administrator-defined tags and user-defined tags.
2. Select the row with the tag that you want to delete.
3. Click **Delete**.

   A message is displayed, stating that all the references to the tag will be removed.
4. Click **Delete** to delete the tag.

ORACLE

Assign the Create Tag Privilege for Creating Service Request Tags

A user must have the Create Tag privilege to create a tag when they're on the SR page. The Create Tag privilege is provided to all the predefined service roles by default. But as an administrator, you can remove this privilege from any role. So you have more control over who can create tags. A user without the Create Tag privilege can't create tags, but he can associate existing tags with the SR as long as he can create or edit an SR.

Note: If you're using the predefined service roles such as Customer Service Representative and Customer Service Manager, then you don't need to do anything. These roles already have the Create Tag privilege.

But if you have custom roles for your service users, then you must do one of the following:

- If you don't want your users to create their own tags while editing an SR and instead associate only the existing tags to the SR, then you don't need to make any changes.

- If you want to let your users create their own tags when editing an SR, then you can assign the Create Tag privilege to them.

To assign the Create Tag privilege to a role:

1. Navigate to the Security Console.
2. Find the custom role equivalent to the predefined Service Request Troubleshooter duty role.

   This duty role would typically be associated with your custom Customer Service Representative job role.
3. Edit the role and navigate to the Function Security Policies section of the wizard.

   For more information, see the Edit Job or Abstract Roles topic in the Oracle Fusion Securing Fusion Sales and Fusion Service guide.
4. Click **Add Function Security Policy**.
5. Search for the Create Tag privilege.
6. Add the Create Tag privilege to the role.
7. Submit your changes.

Note: If you have a custom version of the Service Request Power User duty role, then you can follow the same steps as above to assign the Create Tag privilege to that role. This duty role would typically be associated with your custom Customer Service Manager job role.

Related Topics

- Modify Application Pages Using Application Composer
- Overview of Setup Data Export and Import
- Export Setup Data Using Implementation Project
- Set Up an Offering with Scope
- Edit Job or Abstract Roles

ORACLE

How do I configure Multichannel Architecture (MCA) profile options?

Profile options let you configure and control application data centrally. Use the Multichannel Architecture (MCA) profile options to manage the MCA runtime profile option values. Administrators and setup users manage MCA profile options in the Setup and Maintenance work area.

To configure the MCA Profile Options:

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

   - Offering: Service
   - Functional Area: Communication Channels
   - Task: Manage MCA Profile Options

2. Click the name of the profile option you want to set.

   This displays the **Manage MCA Profile Options** page for the selected profile option code.

3. In the Profile Values section for the profile option code, set the **Profile Value** for the Site **Profile Level**.
4. In the selected profile value, click the **New** icon to add a profile value.
5. Click **Save** or **Save and Close** to save the configuration.

MCA Profile Options

The following table lists the various MCA profile options that you can configure:

Profile Option	Description
SVC_MCA_DISABLE_JWT	Enables or disables the JSON Web Token generation.
SVC_MCA_DISABLE_OUTBOUND_ CONTACT_VERIFY	Enables or Disables automatic display of contact verification screen for outbound calls. If enabled, it will override the call flow parameter configurations.
SVC_MCA_DISABLE_OUTBOUND_WRAP_ UP	Enables or disables automatic display of the wrap-up screen for outbound calls. If enabled, it will override the call flow parameter configurations for wrap up. **Note:** For Digital Sales implementations, this setting must be enabled.
SVC_MCA_ENABLE_ENGAGEMENT_SYNC	Controls the in-focus chat interactions to be automatically associated with their screen popped tabs.
SVC_MCA_RECORD_ACTIVITIES_YN	Indicates whether activities must be logged for real time interactions. **Note:** For Digital Sales implementations, this setting must always be disabled (set to No).

ORACLE

Profile Option	Description
SVC_MCA_RT_CHECK_EVENT_DISPATCH_INTERNAL_MS	Sets the number of milliseconds the user must wait for the start communication event. We recommend that you don't change this value unless instructed by Oracle Support.
SVC_MCA_RT_EVENT_DISPATCH_MAX_RETRIES	Sets the number of times the user must wait for reverse lookup to return before running the start communication event. We recommend that you don't change this value unless instructed by Oracle Support.
SVC_MCA_SHOW_CONTACT_ON_WRAP_UP	Indicates whether to show the contact information during the wrap up process.
SVC_OVERRIDE_PARTNER_TOOLBAR_SELECTION	This option allows user to override system default setting of the partner media toolbar. User can select other toolbars from the list of active toolbars.
SVC_OVERRIDE_PARTNER_TOOLBAR_SELECTION	Enables the administrator to override the default setting of the partner media toolbar. The administrator can select other toolbars from the list of active toolbars.
SVC_PARTNER_MEDIA_TOOLBAR_ENABLED	Controls the visibility of the partner media toolbar. If it's not enabled, the partner media toolbar is hidden.
SVC_TOOLBAR_DEBUG_MODE_ENABLED	Turns on the JavaScript logging messages for debugging toolbar-related issues.

How do I view the milestone diagnostics report?

Here's how you can view the milestone diagnostics report:

1. In the Setup and Maintenance work area, go to the following:
2. On the Manage Milestone Configuration page, click **Actions > View Milestone Diagnostics**.

   The Service Request Milestone Diagnostics page is displayed.
3. Enter the request number in the **Service Request** field.
4. Click **Check Milestones**.

   The milestones that are applicable to the specified request are displayed in a table, with the corresponding metrics and the following details:

   - **Defined for BU**: Indicates whether the milestone configuration definition was created for the applicable business unit.
   - **Applicable to SR**: Indicates whether the milestone from the specified coverage would be applied to the request.
   - **Notes**: Provides more information when the milestone isn't applicable to the request.

How do I configure the prefix and radix?

When a service request (SR) is created, a unique number or ID is generated for it by the application.

Users can't easily read or use these unique IDs because of their length and complexity. As an administrator, you can configure the unique ID that's generated to make it more user-friendly, readable, and specific to your requirement.

This user-friendly value called the public unique ID consists of a prefix and a radix, and you can configure both of them. For example, SR_0000027413 is a configured public unique ID, where SR_ is the prefix and 0000027413 is the radix or suffix.

To configure the prefix and radix for SRs:

1. Sign in to the application as a setup user or administrator.
2. In the Setup and Maintenance work area, go to the following:
    o Offering: Service

    o Functional Area: Productivity Tools

    o Task: Manage Public Unique Identifier Sequence Generation
3. On the Manage Public Unique Identifier Sequence Generation page, for the Service Request **Object Name**, specify a prefix of your choice in the **Prefix** column. For example: SR-.
4. Click in the **Radix** column for the Service Request object.
5. From the multiple options displayed in the drop-down list, select the type of radix that you want for your SRs .

    This option determines the radix value of the request number. To format the auto generated radix value, you can configure the SVC_PUID_FORMAT profile option as described in the "Profile Options for SR Management" topic.

    > **Note:** For more information about the types of public unique IDs, see the Oracle Fusion Cloud Sales Automation Implementing Sales guide.

6. Click **Save and Close**.

How do I validate my inbound and outbound email setup?

You can verify your inbound and outbound email configurations by using the Inbound Email Configuration and Validation page.

On this page, you can proactively take corrective actions to fix any wrong or missing configuration. The validations on this page save you the trouble of raising a support ticket or checking the logs.

Use the Inbound Email Configuration and Validation page to do the following validations:

- Inbound email channel profile options
- Channel setup
- Access points for inbound email

- Outbound email flow
- Inbound email flow

To verify your email channel configurations:

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

   - Offering: Service
   - Functional Area: Communication Channels
   - Task: Manage Email Configuration, Registration, and Validation

   The Inbound Email Configuration and Validation page is displayed.

2. In the Email Configuration region, click **Validate**.

   The following validations happen in this region:

   - **Channel Setup**: Checks whether you've done the following:

     - Configured at least one non predefined channel.
     - Specified a Business Unit for every channel.
   - **Profile Option**: Reads the SVC_INBOUND_EMAIL_ADDRESSES profile option for email addresses and displays an error message if email addresses aren't defined.
   - **Access Point Setup**: Checks whether the access points are registered appropriately. It's important to register the correct access points.

   For each setup or configuration that's valid, a tick mark is displayed.

   If the configuration is invalid or the setup isn't done correctly, a cross mark is displayed. A suitable message is displayed, describing the corrective action that you must take.

3. In the Email Flow region, in the **Recipient** field, enter your company's test mail ID.

   The email flow for the outbound and inbound emails is validated here.

4. Click **Validate**.

The following validations happen in this region:

- Outbound Email Validation:

  An outbound email is sent to the specified email address and it's verified whether the message is delivered successfully.

  - If the host, port, or password are incorrect, a suitable error message is displayed and the status is displayed as DELIVERY_TO_GATEWAY_FAILURE.
  - If the email is delivered successfully, the status code is displayed as DELIVERY_TO_GATEWAY_SUCCESS.

- Inbound Email Validation:

  The following validations happen:

  i. Test emails are sent to all the email addresses specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option and the delivery status is verified for each message.
  ii. If an email address isn't registered as an access point, then you can't receive emails from that email address. The status appears as DELIVERY_TO_CLIENT_FAILURE. An error message is displayed, explaining the suitable action to be taken.
  iii. For each email address specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option, a success or failure message is displayed along with the status.

     The status is displayed as:

     - DELIVERY_TO_CLIENT_SUCCESS: When the inbound email is received successfully by the access point.
     - DELIVERY_TO_CLIENT_PENDING: When the message is received but not yet processed. You must verify whether the inbound poll job is scheduled.
     - DELIVERY_TO_CLIENT_FAILURE: When the access point isn't registered.

5. Click **Reset** to clear the **Recipient** field and all the messages related to the recipient.

How do I use Service Logistics Parts Order with work orders?

To order parts on work orders, you need to expose the **Parts Order** region and the **Service Request Work Order Parts Order** tab on the Work Order page. If you're using Service Logistics, you must expose the Service Logistics Parts Order region from Setup and Maintenance.

> **Note:** You must have a role that contains the following privileges:
>   - Setup and Maintain Applications
>   - Setup Service
>   - Setup Service Work Order

To expose the Service Logistics **Parts Order** region and **Service Request Work Order Parts Order** tab, do the following:

1. Go to Setup and Maintenance:
   - Offering: Service
   - Functional Area: Change Feature Opt-in
2. In the Service row, click the **Edit** icon in the Features column.
3. Click the **Enable** icon for **Service Logistics Parts Order**.
4. In the Feature Name: Service Logistics Parts Order window: select the following:
   - **Service Request Parts Order** check box to enable only part orders (no field service work order).
   - **Service Request Work Order Parts Order** check box for both parts and work orders.
5. Click **Save and Close**.
6. Click **Done**.
7. Click **Done** on the Opt In page.

The Service Request Parts Order region and tab now appear on the Work Order page. Refer to the *Getting Started with Service Logistics Cloud Implementation* guide to continue setup of Service Logistics.

How do I do an advanced search on service requests?

Use advanced search to narrow down search results by entering more specific criteria. For example, to see all the open SRs that are assigned to your subordinates and are in progress, do the following:

1. Click the **Show Advanced Search** button as shown in the following screenshot:
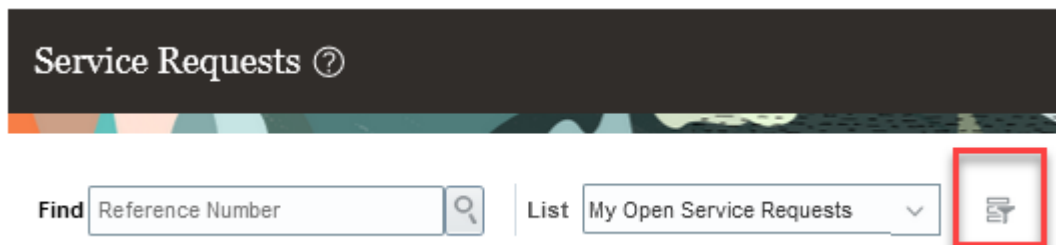
2. Select **All Open Service Requests** in the **Saved Search** field.
3. For the **Record Set**, select **Equals** and **Assigned to my subordinates**.
4. For the Status, select **Equals** and **In Progress**.
5. Optionally, click **Add** to add more search criteria.
6. Optionally, click **Save** to save the search for future use.
7. Click **Search** to see the search results.

How do I create and edit private SmartText entries?

Create your own SmartText entries. They're only visible to you, and they're saved in the Private Set tab.

1. On the Create or Edit Service Request page, click the Navigator, choose Tools, and then SmartText.
2. Click the **Create** icon on the **Private Set** tab.
3. On the **Manage SmartText** page, click the **Private** tab.
4. Make sure the default value of **Service** appears in the **Domain** drop-down list.

   Note: To create SmartText entries for Chat, make sure to choose Chat from the Domain drop-down list.

5. Make a selection from the **Business Unit** drop-down list (if available).

   If the HZ_ENABLE_MULTIPLE_BU_CRM profile option is enabled (set to Y) you'll have access to this drop-down list.

   If you're an administrator, the drop-down list displays all BUs in your organization. If you're not you're shown only the BUs that you're assigned to along with the Null "No associated business unit" value which is visible to administrators and agents across your organization.

   Note: A default business unit is assigned whether you have multiple BUs enabled or not. The default BU is set up when you configure the HZ_DEFAULT_BU_CRM profile option.

6. Select a folder in which you want to create the public SmartText entry. You can either select an existing folder, or create a new folder to save your SmartText entry.

   Note: **Root** is a reserved folder name and administrators can't create a folder with this name.

7. Click the **Create** (**+**) icon and select **New SmartText**.
8. On the **Manage SmartText** page, enter the following details:

   o Enter a name for the SmartText entry. There are some restrictions on special characters, so see *What are the SmartText naming conventions?*

   o Select **Use HTML** to use rich text formatting in your SmartText entry. You can insert tables and images here.

   o Enter the text you want to insert.

   o Insert a variable, if you want, by typing the @ symbol followed by the variable name.Click the **Tab** key to automatically complete the variable, or use the navigation arrows on your keyboard, then press the **Enter** key. The variable is inserted where the cursor stands in your text.

   o Click **Save as Personal**.

9. To edit the Private SmartText entry, do the following:

   o Select the SmatText entry you want to edit.

   o Select the **Language** of the SmartText entry from the drop-down list

   o You can also create in a new language by clicking the **Add** icon.

   o Edit the Private SmartText entry and click **Save as Personal** to publish the SmartText entry.

You can view and manage all your Private SmartText entries from the Private SmartText tab. You can add, duplicate, and delete your private set SmartText entries.

ORACLE

How do I create and edit public SmartText entries?

Create your own Public SmartText entries. Public entries are available to all users.

To create a Public SmartText entry, do the following:

1. On the Create or Edit Service Request page, click the Navigator, choose Tools, and then SmartText.
2. Click the **Create** icon on the Public tab.
3. On the **Manage SmartText** page, click the **Public** tab.
4. Make sure the default value of **Service** appears in the **Domain** drop-down list.

   > **Note:** To create SmartText entries for Chat, make sure to choose Chat from the Domain drop-down list.

5. Make a selection from the **Business Unit** drop-down list (if available).

   If the HZ_ENABLE_MULTIPLE_BU_CRM profile option is enabled (set to Y) you'll have access to this drop-down list.

   If you're an administrator, the drop-down list displays all BUs in your organization. If you're not you're shown only the BUs that you're assigned to along with the Null "No associated business unit" value which is visible to administrators and agents across your organization.

   > **Note:** A default business unit is assigned whether you have multiple BUs enabled or not. The default BU is set up when you configure the HZ_DEFAULT_BU_CRM profile option

6. Select a folder in which you want to create the public SmartText entry. You can either select an existing folder, or create a new folder to save your SmartText entry.

   > **Note:**   **Root** is a reserved folder name and administrators can't create a folder with this name.

7. Click the **Create (+)** icon and select **New SmartText**.
8. On the **New SmartText** page, do the following:

   - Enter the name for the SmartText entry. There are some restrictions on special characters, so see *What are the SmartText naming conventions?*
   - Select **Use HTML** to use rich text formatting in your SmartText entry. You can insert tables and images here.
   - Enter the text you want to insert.
   - Insert a variable, if you want, by typing the @ symbol followed by the variable name. Click the **Tab** key to automatically complete the variable, or use the navigation arrows on your keyboard, then press the **Enter** key. The variable is inserted where the cursor stands in your text.

9. Select **Publish** to save this entry in the **Public** tab for all users. If you don't select **Publish**, the SmartText entry is saved in your **Private** folder and is available only to you.
10. Verify the location where you're saving the SmartText.
11. Select the availability of the SmartText entry from the list of **Availability** options.
12. Click **Publish** to publish the SmartText entry.

To edit a Public SmartText entry, do the following:

1. Select the SmartText entry you want to edit.
2. Select the **Language** of the SmartText entry from the drop-down list

ORACLE

3. You can also create a new language by clicking the **Add** icon.
4. Edit the Private SmartText entry and click **Publish** to publish the SmartText entry.

How do I use SmartText?

A SmartText entry is a reusable fragment of text that you can use. SmartText saves time and effort by reducing your keystrokes while also improving the overall consistency of written communication.

You can create your own SmartText entries, or use those that are already available for general use. You can also create SmartText entries in any supported language.

> **Note:** You can use plain text and HTML to create SmartText entries for use in Chat windows and Service Request Message fields. Other SR fields, such as Problem Description and Solution Description only support plain text.

There are two kinds of SmartText:

- Private: You create these entries yourself and you're the sole user.

- Public: Public entries are available to all users.

SmartText entries for Service Request fields can contain system variables and user-defined variables. SmartText for chat supports only user-defined variables. System variables are public and can't be edited or deleted. User-defined variables are private, you can create, edit and delete them. For example, say you had a variable where you assigned "Service Request" as the object, and "Primary Contact" as the attribute. When this SmartText entry is used, the primary contact listed for the service request is automatically substituted for the variable in the text field.

What are the Service Request Details Summary page options?

When you start creating an SR, the Create Service Request page displays three buttons: Save and Continue, Save and Close, and Cancel.

After you enter a title and save the SR, or open an SR for editing, the page also displays the **Actions** menu, and a **Refresh** icon. Click the **Refresh** icon to refresh the Service Request Details Summary page with the latest updates.

The following table lists and describes the available actions in the **Actions** menu.

What would you like to do?	How to do it
Enter simple and consistent resolution information about the SR	Select **Resolve**.
Assign the SR to yourself	Select **Assign to Me**.
Make a copy of an existing SR.	Select **Copy**.

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What would you like to do?	How to do it
Note: You can configure the Copy SR action to include the custom fields on the SR object. This enables all non empty custom fields to be automatically populated in the destination SR.	
Delete an SR	Select **Delete**. This option is available only to administrators. A deleted service request can't be retrieved, and the delete action can't be undone.
Forward an SR to another user of the application	Select **Forward**.
Assign a queue to the SR	Select **Run Queue Assignment**.

On the Edit Service Request Summary page, if you click the **Refresh** icon and there are unsaved changes, the **Edit Service Request: Unsaved Changes** dialog box is displayed. It contains the following buttons:

- **Refresh**: Reverts your unsaved changes and keeps you on the Edit Service Request Summary page. Any saved changes that are made by either another user or by a program, will be retained.
- **Cancel**: Persists your unsaved changes and keeps you on the Edit Service Request Summary page.

How do I enable Installed Base Assets for service requests and work orders?

If you use Installed Base Assets for processes such as Supply Chain, Service Logistics, Service Contracts, or IOT, you can opt-in to use the same asset model for SRs and Work Orders. Use Application Composer to add the Installed Base Asset fields to the SR and Work Order pages.

Enable Installed Base Assets

To opt in, do the following:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Change Feature Opt in link
2. Click the **Features** icon for Service in the first row.
3. Select Enable for **Manage Assets Using Common Asset Model**.
4. Click **Done**.
5. Click Done on the Opt In page.

> **Note:** This is a global setting where you choose whether to use Installed Base Assets or the default Asset object for the Service Request and Work Order process. You can't use both asset objects in Fusion Service so you should carefully consider the impact if you have requirements to support asset management outside these processes. For example, Installed Base Asset doesn't currently support sales processes in Fusion Sales and Service and has limited support for extensibility.

How do I configure profile options to display an email thread?

When an agent responds to a customer's email from the Messages tab in a service request, it's good to display the email thread. To enable the display of the email thread, you must configure the following profile options.

Profile Option	Description
SVC_EMAIL_ENABLE_PAST_CONVERSATIONS	Indicates whether to display past conversations. To enable past conversations, set the value to Yes. The default value is No, so it's disabled by default.
SVC_EMAIL_NO_OF_PAST_CONVERSATIONS	Indicates the number of past conversations to be included in the email thread. The default value is 1. You can specify a value from 1 to 10. If you set the value to 0, no past conversations are included. And even if you set a value greater than 10, only a maximum of 10 conversations are displayed.
SVC_EMAIL_PAST_CONVERSATION_START_MARKER	Indicates the start marker for each conversation in the email thread. This value is fixed and is displayed in English by default. To translate and display this value in the language of your choice, you must set the required locale in the ORA_SVC_EMAIL_DEFAULT_LANGUAGE profile option.
SVC_EMAIL_PAST_CONVERSATION_END_MARKER	Indicates the end marker for each conversation in the email thread. This value is fixed and is displayed in English by default. To translate and display this value in the language of your choice, you must set the required locale in the ORA_SVC_EMAIL_DEFAULT_LANGUAGE profile option.
ORA_SVC_EMAIL_DEFAULT_LANGUAGE	Indicates the default language to format outbound emails and parse inbound emails. The default value is blank. When it's blank, the existing values for the start and end markers are displayed for the past conversations. For details about these markers, see the preceding two rows in this table. You can specify the locale as a value for this profile option. For example: en for English, fr for French, and pt for Portuguese. When you specify the locale, the translated values for the following start and end conversation markers are displayed in the specified language: • SVC_EMAIL_PAST_CONVERSATION_START_MARKER: [##Send your response as a reply to the above mail##]

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Profile Option	Description
	• SVC_EMAIL_PAST_CONVERSATION_END_MARKER: [##End of conversation##]
SVC_EMAIL_PAST_CONVERSATION_MSGTYPES	Indicates the types of messages to include in the email thread. You must specify the codes for the message types, separated by commas. For example: ORA_SVC_INTERNAL_NOTE, ORA_SVC_RESPONSE, ORA_SVC_SYSTEM_NOTE, ORA_SVC_CUSTOMER_ENTRY, ORA_SVC_FORWARD, ORA_SVC_SYSTEM_RESPONSE. You can't specify the meaning or the display name of the message type. The default value is ORA_SVC_CUSTOMER_ENTRY. **Note:** To add codes for other message types, see the "Search for Lookup Codes of Message Types" section at the end of this topic.
ORA_SVC_EMAIL_PAST_CONVERSATION_SHOW_MSG_TYPES	Indicates whether to include the message type in past conversations. The default value is Y. The message type is translated based on the signed-in user's locale. But the default language might be different. Let's say the signed-in agent's locale is Japanese and the default language is Chinese. So while everything gets translated to Chinese, only the message types appear in Japanese. If your customers contact you about this issue, you can set the value to No. The message type is no longer included in past conversations.
ORA_SVC_EMAIL_DEFAULT_PAST_CONVERSATIONS_IN_OUTBOUND_MSGS	Indicates whether to enable past conversations by default in outbound messages.
ORA_SVC_EMAIL_PAST_CONVERSATION_CHAN_TYPES	Includes messages from only one or more specific channels in past conversations. Set the value to a comma-separated list of those specific channel types that you want.

To configure the profile options for displaying the email thread:

1. Navigate to the Setup and Maintenance work area and open the Tasks panel tab.
2. Click **Search** from the list of displayed tasks.
3. In the **Search** field, type `Manage Admin.`
4. From the displayed list of tasks, click **Manage Administrator Profile Values**.
5. In the Manage Administrator Profile Values page, navigate to the **Search: Profile Option** region.
6. In the Profile Option Code field, type `%`.
7. Select **%PAST_CONVERSATION%** from the options displayed.
8. Click **Search**.

   The Search Results: Profile Options region displays the list of profile options related to past conversations.
9. Select the profile options one by one.
10. In the Profile Values region, specify the values in the **Profile Value** column for the **Site** Profile Level as described in the table.
11. Repeat the previous step for each profile option in the search results.
12. Click **Save**.

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Search for Lookup Codes of Message Types

Follow these steps to search for the lookup codes of message types that you want to add in the SVC_EMAIL_PAST_CONVERSATION_MSG_TYPES profile option. You can use the same steps to search for the lookup codes of message types available in the Compose menu in the Messages sub tab of an SR.

1. Sign in as an administrator.
2. Navigate to the Setup and Maintenance work area and open the Tasks panel tab.
3. Click **Search** from the list of displayed tasks.
4. Search for and select **Manage Standard Lookups**.
5. In the Manage Standard Lookups page, in the **Lookup Type** field, type `ORA_SVC_MESSAGE_TYPE_CD`.
6. Click **Search**.
7. From the **Lookup Code** column in the ORA_SVC_MESSAGE_TYPE_CD: Lookup Codes region of the page, copy the lookup codes that you want to specify in the SVC_EMAIL_PAST_CONVERSATION_MSG_TYPES profile option.

   Note:
   - The lookup codes ORA_SVC_CHAT_TRANSCRIPT and ORA_SVC_WRAP_UP aren't applicable to emails.
   - If you disable any of the following lookup codes, the corresponding message types disappear from the Compose menu on the Messages sub tab of an SR: ORA_SVC_INTERNAL_NOTE, ORA_SVC_RESPONSE, ORA_SVC_CUSTOMER_ENTRY, and ORA_SVC_FORWARD.

What's the service request lifecycle?

Creating or editing an SR includes the following steps. You don't need to do all the steps, and they don't need to be done in the order we're presenting.

- Enter the summary information: View SR details about what the service request is about such as the customer account, primary contacts, SR description, and so on. You can also add tags to the SR. For more information about adding tags, see "Tagging Service Requests".

- View Interaction History: View details about the various interactions an agent has had for a service request. Get details on who called whom, through what communication channel, what were the top interactions, and with what customer. The view always shows the parent interaction with the associated child interactions (including the cross-channel interactions) in a nested view with the parent interaction. To view the associated interactions, click the + icon next to the parent interaction.

- Compose messages: Use the Messages tab to view, create, and send messages and notes on the SR.

- Add contacts: Add customer contacts to the SR.

- Add team members: Add team members who can view and work on the SR.

- Create activities: Create activities such as appointments, tasks, and log calls with the customer.

- View linked articles: View related knowledge articles that can help resolve the SR.

- View Service Request Milestones: View the service milestones for the SR.

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- Manage Work Orders: Manage your work orders to ease resolution of the SRs.

- View Audit History: View changes to the application data such as the business objects that were created, updated, and deleted

A Typical SR Flow

This flowchart describes the process flow of a Service Request:

An Example of an SR Process

A typical and simple example of an SR Lifecycle flow is given below:
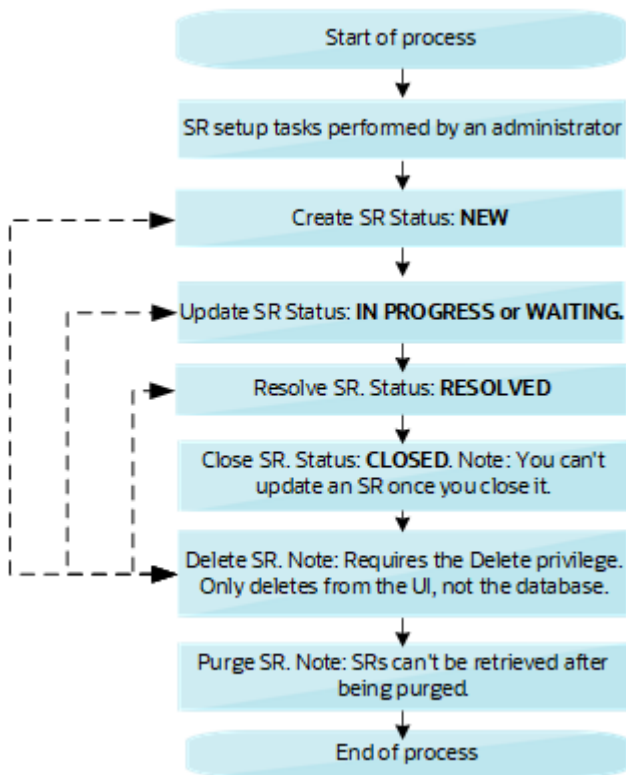
- The agent receives an inbound email from a customer. This creates the SR in "New" status.

  Use any of the following methods to create an SR:

  - Customer sends email to create the SR. This requires setup by an administrator.
  - Customer creates the SR using Digital Customer Service. Requires setup by an administrator.
  - Agent manually creates the SR by clicking the **Create SR** button.
  - Use other methods such as REST or Import.

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- The agent starts working on the SR, and changes the status of the SR to "In Progress".

  Use any of the following methods to update the SR:
    - Customer sends email to update the SR.
    - Customer updates the SR using Digital Customer Service.
    - Agent manually updates the SR.
    - Use other methods such as REST or Import.

- The agent realizes that they need some extra information from the customer. So they send an email to the customer and flip the SR status to "Waiting".

- The customer replies back to the email. Currently, the application changes the status back to IN PROGRESS. Here status change isn't ready-to-use, and requires setup in the application.

- The agent replies back to the customer with the solution and sets the SR status to Resolved.

  Use any of the following methods to resolve the SR:
    - Automatic Resolve of the SR from Waiting status. Require setup by an administrator.
    - Customer resolves the SR using Digital Customer Service.
    - Agent manually updates the SR.
    - Use other methods such as REST or Import.

- After X days of the SR being resolved, the application flips the status of the SR to Closed, if the customer has configured the ESS job to close SRs.

How do I register or unregister access points for inbound email?

For your inbound emails to be processed successfully, you must register the email addresses in the SVC_INBOUND_EMAIL_ADDRESSES profile option as access points. If your inbound email address changes for some reason, then you must register the new inbound email address as an access point.

Sometimes, you might must unregister a wrong email address that was registered by mistake. The **ORA_SVC_UNREGISTER_INBOUND_ACCESS_POINT** profile option controls the ability to unregister access points. Its default value is No. When it's set to the default value, the Unregister button for an access point isn't available. This setting helps to prevent unregistering of access points accidentally. Only when you specifically need to unregister an access point, you can change the value to Yes so that the **Unregister** button is available. After unregistering the access point, you can set the value of this profile option back to No.

> **CAUTION:** When you register or unregister access points, they don't reflect in all the server instances, and some inbound emails might not be received. To prevent this from happening, you can do one of the following:
> - Restart the servers to reflect the registering or unregistering of access points. You must contact Oracle Support for restarting the servers.
> - Configure the **Retrieve Inbound E-mail Messages** job to run at a suitable frequency. See *How do I configure a job to process inbound emails?*

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To register the access points for inbound email:

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

   o Offering: Service

   o Functional Area: Communication Channels

   o Task: Manage Email Configuration, Registration, and Validation

2. On the Inbound Email Configuration and Validation page, in the Email Configuration region, click **Validate**.

   The access point setup is validated in this region.

   The following email addresses are displayed in the **Access Point Value** column of the Access Point Setup region:

   o Email addresses specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option.

     Suppose one or more of these email addresses aren't registered as an access point with the UMS. In such cases, a **Register** button appears in the **Action** column for these email addresses.

   o Email addresses that are registered as access points in the UMS.

     All email addresses that are registered as access points with the UMS are displayed in this section. An **Unregister** button appears in the **Action** column for each email address.

     | **Note:** Don't click **Register** and **Unregister** at this stage. You must complete the remaining steps.

3. Verify whether the email addresses specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option are correct.

4. If the email addresses in the SVC_INBOUND_EMAIL_ADDRESSES profile option aren't correct, update them to show the correct values.

5. Refresh the Inbound Email Validation and Configuration page.

6. If you still see a **Register** button, click the button to register the email address with the UMS.

7. If you still see an **Unregister** button, click the button, because the email address is wrong.

   The wrong email address is unregistered, and is no longer an access point with the UMS.

   Note:
   o When you unregister an email address, all inbound emails to that email address are lost.

   o If the **Unregister** button appears grayed out and you can't click it, set the ORA_SVC_UNREGISTER_INBOUND_ACCESS_POINT profile option to Yes as explained earlier in this topic. Now you can click the **Unregister** button.

How do I add Visual Builder roles?

You must add roles in Oracle Visual Builder and Oracle Visual Builder Studio to configure appropriate authorization for your Oracle Visual Builder platform and editor.

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Instead of assigning roles to each user individually, you can simplify the process by creating groups and adding users to groups as a way to assign roles. Each time you add a user to a group, the user automatically gets the roles defined for the group. Or you can assign individual users to the Visual Builder roles.

Add Users to a Group

Add users to a group so that they automatically get the permissions defined for the group.

1. Sign in to Oracle Identity Cloud Service Console as an administrator.
2. From the Oracle Identity Cloud Service console, click the **Navigation menu** icon.
3. Click the **Groups** tab.
4. On the Groups page, click the group that you want to assign users to or add a new group.
5. On the Group Details page, select the **Users** tab.
6. Click **+ Assign**.
7. Select the users you want to add to the group, then click **OK**.
   The selected users are added to the group. You can now assign roles to all the users in the group, if required.

Assign Users or Groups to Roles in Visual Builder

After you create groups and add users to groups, you can assign roles and provide access to services and instances to all the members of the group at once.

Assign Roles to Users in Visual Builder

1. In Identity Cloud Service, click the **Navigation Drawer**, and select **Oracle Cloud Services**.
2. Select your Visual Builder instance.
   You can use the filter to help you find your instance. For Oracle Visual Builder Studio instances search for
   `visualbuilder.`
3. Click the **Application Roles** tab.
4. Click the menu options icon shown next to the role, and select **Assign Users**. To assign the role to a group, you need to select **Assign Groups**.
5. Assign the Oracle Visual Builder **Service Developer** role to the group or users that require Build and Maintain access in the Oracle Digital Customer Service applications.
6. Assign the Oracle Visual Builder **Service Administrator** role to the group or users that require Administrative access to configure instance-wide settings for the Oracle Visual Builder environment for all applications.

Assign Roles to Users in Visual Builder Studio

Note: The following VB Studio steps apply only to one pod, typically your TEST instance. VBCS, however, is provisioned on all pods so those steps for the application roles are applicable to all instances.

1. Sign in to Identity Cloud Service, click the **Navigation Drawer**, and select **Oracle Cloud Services**.
2. From the Oracle Cloud console dashboard, navigate to the Identity Cloud console and click **Applications**.
3. Click the link for your Oracle Visual Builder Studio instance.
   You can use the filter to help you find your instance. For Oracle Visual Builder Studio instances search for your instance prefixed with "VBINST".
4. Click the **Application Roles** tab.
5. Click the menu options icon shown next to the role, and select **Assign Users**. To assign the role to a group, you need to select **Assign Groups**.

6. Select the check box next to the name of each user that you want to add to the role, and then click **Assign**.

   > **Note:** You must add the DEVELOPER_USER or the DEVELOPER_ADMINISTRATOR user roles.

How do I set the From Name in outbound emails?

When you send emails to your customers, the **From Name** in the outbound email is typically the channel name. But you have the option to set the resource name as the **From Name** in outbound emails.

You can do this by configuring the **ORA_SVC_ENABLE_RESOURCE_NAME_USAGE_IN_OUTBOUND** profile option.

To set the service agent's name as the From name in emails sent to your customers:

1. Ensure that you've configured the SPF policy to enable outbound email so that your emails aren't rejected by your customer's mail server.
2. Sign in as a setup user or administrator.
3. Navigate to the **Setup and Maintenance** work area and open the **Tasks** panel tab.
4. Click **Search** from the list of displayed tasks.
5. Search for and click **Manage Administrator Profile Values**.
6. On the Manage Administrator Profile Values page, navigate to the Search region.
7. In the **Profile Option Code** field, type `ORA_SVC_ENABLE_RESOURCE_NAME_USAGE_IN_OUTBOUND`.
8. Click **Search**.

   The ORA_SVC_ENABLE_RESOURCE_NAME_USAGE_IN_OUTBOUND profile option is displayed in the Search Results: Profile Options region.
9. In the Profile Option Levels region, set the **Profile Value** for the Site **Profile Level** as **Yes**.
10. Click **Save and Close**.

What are the SmartText naming conventions?

The following restrictions on special characters are applicable when you create a Public or Private SmartText:

- You can't include the following Trigger keys such as # and @ in the name, as these might cause interaction problems.
- The following special characters aren't allowed:
  - Tilde
  - Number sign
  - Percent
  - Ampersand
  - Asterisk
  - Flower Bracket
  - Backslash
  - Colon

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- - Angle Bracket
  - Slash
  - Plus sign
  - Question mark
  - Pipe
  - Quotation mark
  - Double Square Bracket

- You can't use the following special characters:

  - Exclamation mark
  - Pound
  - Dollar
  - Round Bracket
  - Euro
  - Caret
  - Underscore
  - Equal to
  - Semi-colon
  - Comma
  - Dot

How do I create a service mapping?

Here's how you create a service mapping:

1. On the Subscription Configuration page, click **Dynamic Matrix Configuration > Manage Service Mappings**.

   The Manage Service Mappings page is displayed.
2. Click **Subscription Entitlements**.

   The Edit Service Mapping: Subscription Entitlements page is displayed.

   > **Note:** If you're using Service Contracts, then you navigate to this page by clicking **Navigator > Contract Management > Contracts > Tasks > Manage Service Mappings > Contracts Service Entitlements**.

3. On the **Entities** tab, select .

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4. In the **ServiceRequest: Details** section, click **Add Row** to add your attribute and select the details, for the mapping.

   Note:
   - All attribute names must have the suffix **_Custom**.
   - Ensure that **Write** is disabled for the selected attribute.

5. Click **Save**.
6. Click the **Sources** tab (on the same page, Edit Service Mapping: Subscription Entitlements).
7. In **Source**, select .
8. Select **ServiceRequest** in the tab.
9. On the **Entitlement: Details > Attribute Mappings** tab, click **Add Row** to create the mapping for the new attribute.
10. Select the attribute that you created in step 4 from the **Attribute** drop-down list and enter the related **View Object Attribute** of the .

    Note: Ensure that **Write** is disabled for the selected attribute.

11. Click **Save**.
12. Click the **Services** tab (on the same page, Edit Service Mapping: Subscription Entitlements).
13. Select **ServiceRequest** in the **GetSubscriptionEntitlements: Details > Entities** tab.
14. In the **ServiceRequest: Entities** section, click **Add Row** to create the mapping for the new attribute.
15. Select the attribute that you added in Step 4 from the **Attribute** drop-down list and enter the values.

    Note: Ensure that **Write** is disabled for the selected attribute.

16. Click **Save and Close**.

How do I enable subscription coverages for entitlements?

Oracle recommends using subscription coverages. New customers are automatically opted-in to Subscription Management instead of Service Contracts. Existing customers who are implementing service entitlements should consider subscription coverages.

The **Manage Service Entitlements Using Subscription Coverages** feature is enabled by default for new instances. If this feature is enabled, the application uses Oracle Subscription Management Cloud to define entitlement calendars, coverages, and associated setup, and uses this setup at runtime to identify service request milestones.

Here's how you can enable this feature:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
2. Click **Change Feature Opt In**.

   Select the **Enable** checkbox in the Service Entitlements row.
3. Click **Done**.

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How can I be notified when a customer replies to a message?

Here's a sample code to trigger a notification to be sent to the recipient specified in the Notification Preferences page when a customer replies to a message.

You can copy and paste this sample code in Application Composer > Objects > Standard Objects > Service Request > Message > Server Scripts.

```
/* DISCLAIMER: This trigger is provided only as a reference.
* TRIGGER TYPE: Before Insert to Database
* OBJECT: Message (child of Service Request)
* Use Case: Send a notification to the assignee when a customer entry is created.
* Note: You can override the Notification Text and Recipients using the Notification Preferences page.
*/
if (MessageTypeCd == 'ORA_SVC_CUSTOMER_ENTRY') {
 try {

 // Note: The notation ServiceRequest?.SrNumber is used because ServiceRequest is the parent
 // object of Messages. To access the other possible field names, expand the trigger box, click on fx,
 // click on Fields, and select the drop-down list from Message. Click on Service Request to see the
 // available fields. You must click Insert to correctly insert the appropriate field into your script.

 def messageText = "A customer entry was received for " + ServiceRequest?.SrNumber
 def recipientPartyId = ServiceRequest?.AssigneeResourceId
 if (recipientPartyId) {
 // Call to send notification
 adf.util.sendNotification(adf, messageText, recipientPartyId)
 //Log a confirmation that the notification has been sent. Logs can be viewed in 'Runtime Messages'.
 //println("Notification sent to " + recipientPartyId + " because a customer entry was received.")
 } else {
 println("No Assignee associated with this SR")
 }
 } catch (e) {

 // Log the failure in groovy logging. Logs can be viewed in 'Runtime Messages'.
 println("Failure to trigger notification from Groovy Script " + e.getMessage());

 // Throwing validation exception will show the message on the UI. This is not recommended for published
 sandboxes.
 // The following code is one of many to illustrate identifying an error in trigger from UI.
 // Replace <triggerName> with the trigger name you specified when creating this trigger.
 // throw new oracle.jbo.ValidationException('Failure to trigger <triggerName> Notification from Groovy
 Script: ' + e.getMessage())
 }
 }
```

How do I use Groovy script to notify an agent that a service request has been assigned?

Here's a sample groovy script that triggers a notification to be sent to the recipient specified in the Notification Preferences page when a service request (SR) is assigned.

You can copy and paste this sample code in Application Composer > Objects > Standard Objects > Service Request > Server Scripts.

```
/* DISCLAIMER: This trigger is provided only as a reference.
* TRIGGER TYPE: Before Update in Database
* OBJECT: Service Request
* Use Case: Send a notification when an existing SR is reassigned.
* Note: You can override the Notification Text and Recipients using the Notification Preferences page.
*/

if (isAttributeChanged('AssigneeResourceId')) {
try {
def recipientPartyId = AssigneeResourceId
def messageText = 'An SR notification (default message).'

if (recipientPartyId) {
//Call to send notification
adf.util.sendNotification(adf, messageText, recipientPartyId)

//Log a confirmation that the notification has been sent. Logs can be viewed in 'Runtime Messages'.
//println("Notification sent to " + recipientPartyId + " because the SR was assigned to them.")
} else {
println("No Assignee associated with this SR")
}
} catch (e) {
//Log the failure in groovy logging. Logs can be viewed in 'Runtime Messages'.
println("Failure to trigger notification from Groovy Script " + e.getMessage());
// Throwing validation exception will show the message on the UI. This is not recommended for published
 sandboxes.
// The following code is one of many to illustrate identifying an error in trigger from the UI.
// Replace <triggerName> with the trigger name you specified when creating this trigger.
// throw new oracle.jbo.ValidationException('Failure to trigger <triggerName> Notification from Groovy
 Script: ' + e.getMessage())
}
}
```

What are the predefined knowledge roles?

You can use built-in, out of the box, default knowledge roles available in Knowledge to set up and manage knowledge users such as agents, managers, and authors. Most organizations use the predefined roles as the basis for defining new roles to meet their specific needs. You can copy, edit, and save your own roles to assign to users so that they have the right privileges and policies for your organization. You can also create entirely new roles if there are no suitable predefined roles to copy and edit.

Note: This answer is applicable to both Fusion Service Knowledge Management with Redwood and Classic User Experience.

Fusion Service Knowledge Access Roles

Use these predefined roles as starting points to set up users to access knowledge in a Fusion Service application:

- Agents who use knowledge to help resolve customer issues.

- Managers who supervise agents and manage knowledge activities.

- Internal users who use My Knowledge

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- External web users who use public knowledge in Digital Customer Service and in user-defined pages and portals.

Role	Access Locations	User Groups	Application Content
Customer Service Representative	• My Knowledge • Knowledge in SRs	• Internal Service • Everyone	Fusion Service
Customer Service Manager	• My Knowledge • Knowledge in SRs	• Internal Service • Everyone	Fusion Service
Customer Self Service User	• Public web channels	• Everyone	Fusion Service

Fusion Service Knowledge Authoring Role

Use this predefined role as a starting point to set up knowledge authors who contribute content to a Fusion Service knowledge base.

Note: There are additional requirements for setting up knowledge authors that we cover later in this chapter.

Role	Access Locations	User Groups	Application Content
Knowledge Author - Service	Authoring	• Internal Service • Everyone	Fusion Service

HCM Knowledge Access Roles

Use these predefined roles as starting points to set up knowledge users in an HCM HR Help Desk application.

- Managers who manage knowledge activities.
- Internal users who use My Knowledge

Role	Access Locations	User Groups	Application Content
Human Resource Help Desk Manager	• Authoring • My Knowledge • Knowledge in HCM service requests	• Everyone • Employee • Internal HCM	HCM
Knowledge Search - HCM	• My Knowledge	• Internal HCM	HCM

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HCM HR Help Desk Knowledge Authoring Role

Use this predefined role as a starting point to set up knowledge authors who will contribute content to an HCM knowledge base.

> **Note:** There are additional requirements for setting up knowledge authors that we cover later in this chapter.

Role	Access Locations	User Groups	Application Content
Knowledge Author - HCM	Authoring	• Everyone • Employee • Internal HCM	HCM
Human Resource Help Desk Manager	• Authoring • My Knowledge • Knowledge in HCM service requests	• Everyone • Employee • Internal HCM	HCM

General Knowledge Role

Use this predefined role as a starting point to set up knowledge managers who administer the knowledge base and knowledge analytics for Fusion Service and HCM knowledge applications.

> **Note:** There are additional requirements for setting up knowledge authors that we cover later in this chapter.

Role	Access Locations	User Groups	Application Content
Knowledge Manager	• My Knowledge • Authoring • Knowledge analytics • Knowledge setup and maintenance tasks • User management • Public and internal articles	• Internal Service • Internal HCM • Employee • Everyone	HCM and Fusion Service

> **Note:** There is also a Knowledge Analyst role that should not be used in new implementations. It is maintained for compatibility reasons only.

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Can I view an expired milestone sample script?

This is sample code to trigger a notification to be sent to the recipient specified in the Notification Preferences page when a milestone expires.

You can copy and paste this sample code in Application Composer > Objects > Standard Objects > Service Request > Milestone > Server Scripts.

> **Note:** This example uses `WarnedFlag`. However, you can also use `ComplianceFlag` for similar results.

```
/* DISCLAIMER: This trigger is provided only as a reference.
* TRIGGER TYPE: Before Update in Database
* OBJECT: Milestone (child of Service Request)
* Use Case: Send a notification to the assignee when an SR milestone is expiring.
* Note: You can override the Notification Text and Recipients using the Notification Preferences page.
*/

if (isAttributeChanged('WarnedFlag') && WarnedFlag=='Y') {
 try {
 def recipientPartyId = SrAssigneePartyId
 def messageText = 'An SR milestone notification (default message).'

 if (recipientPartyId) {
 //Call to send notification
 adf.util.sendNotification(adf, messageText, recipientPartyId)
 //Log a confirmation that the notification has been sent. Logs can be viewed in 'Runtime Messages'.
 //println("Notification sent to " + recipientPartyId + " because the SR was escalated.")
 } else {
 println("No Assignee associated with this SR")
 }
 } catch (e) {
 //Log the failure in groovy logging. Logs can be viewed in 'Runtime Messages'.
 println("Failure to trigger notification from Groovy Script " + e.getMessage());

 // Throwing validation exception will show the message on the UI. This is not recommended for published
 sandboxes.
 // The following code is one of many to illustrate identifying an error in trigger from the UI.
 // Replace <triggerName> with the trigger name you specified when creating this trigger.
 // throw new oracle.jbo.ValidationException('Failure to trigger <triggerName> Notification from Groovy
 Script: ' + e.getMessage())
 }
}
```

How do I assign a service request to an agent's queue?

Here are the various ways in which you can assign a service request (SR) to a queue:

- Open an SR. From the **Queue** drop-down list, manually select the queue to which you want to assign the SR .
- Enable Omnichannel, which runs the queue assignment rules when the SR is created or when the queue is deleted from the SR .
- Click **Run Queue Assignment** from the **Actions** menu, which runs the queue assignment rules.

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- Enable the Assign Service Request to Queue on Create profile option, which runs the queue assignment rules when the SR is created. The process is described below.

- Schedule the Queue Assignment job that runs the queue assignment periodically and processes all the open SRs that aren't assigned to a queue.

The preferred way of assigning an SR to a queue is by using Omnichannel assignment. Enabling Omnichannel has the following advantages:

- Enabling Omnichannel provides more features than queue assignment. It also enables the automatic assignment of agents. But if your business only requires queue assignment, you must carefully evaluate whether you need to enable Omnichannel.

- Only if you enable Omnichannel, the SR is assigned to the Default queue when the Assignment Manager rules haven't been defined or when the selected SR doesn't satisfy any active rule.

- When Omnichannel is enabled, automatic assignment of SRs to agents is always enabled on the Default queue.

Suppose you're assigning SRs to an automatic queue either manually or automatically by using assignment rules or groovy scripts. If you enable Omnichannel, Oracle recommends that you also assign active agents for the automatic queue, so that SRs can be assigned to the agents.

> **Note:** If you don't assign agents for the automatic queues, SRs assigned to those queues could grow exponentially over time. And this causes the application to slow down.

Enable the Assign Service Request To Queue On Create Profile Option to Assign an SR to a Queue

Here's how you enable the Assign Service Request To Queue On Create profile option:

1. Sign in to the application as an administrator.
2. In the Setup and Maintenance work area, go to the following:

    o Offering: Service

    o Functional Area: Service Request

    o Task: Manage Service Request Profile Options

    > **Note:** Or, you can open the Tasks panel tab and search for the **Manage Service Request Profile Options** task.

3. On the Manage Service Request Profile Options page, click **SVC_ASSIGN_TO_QUEUE_ON_CREATE**.
4. Navigate to the SVC_ASSIGN_TO_QUEUE_ON_CREATE: Profile Values region of the page.
5. In the **Profile Value** drop-down list for the Site **Profile Level**, select **Yes**.
6. Click **Save and Close**.

> **Note:** If Omnichannel is enabled, this profile option is ignored.

How do I set agent capacity?

Capacity indicates the maximum number of open work items of a certain type that an agent can handle. Capacity is configured at a global level for various types of work items by using the Manage Capacities page.

Capacity is calculated separately for real-time work items such as SRs. For example: If the global capacity for open SRs is 30, an agent who's working on 30 open requests is considered to be 100 percent occupied.

If an agent who's accepting chat offers changes their presence state from present or available to busy, then the agent's chat availability status is automatically changed to unavailable, and no chats will be sent to that agent. For non real-time work, agents can remain available, though. For instance, an agent might go to lunch and change presence state to busy which prevents real-time work offers, but the agent could still get non real-time work assigned (assuming the agent has capacity).

If a queue has multiple agents, the work item is assigned to the agent with the maximum free capacity of the relevant type. If more than one agent has the same capacity, the work item is assigned to the agent with the maximum overall free capacity. .

How can I be notified when a customer replies to a message?

Here's a sample code to trigger a notification to be sent to the recipient specified in the Notification Preferences page when a customer replies to a message.

You can copy and paste this sample code in Application Composer > Objects > Standard Objects > Service Request > Message > Server Scripts.

```
/* DISCLAIMER: This trigger is provided only as a reference.
* TRIGGER TYPE: Before Insert to Database
* OBJECT: Message (child of Service Request)
* Use Case: Send a notification to the assignee when a customer entry is created.
* Note: You can override the Notification Text and Recipients using the Notification Preferences page.
*/
if (MessageTypeCd == 'ORA_SVC_CUSTOMER_ENTRY') {
 try {

 // Note: The notation ServiceRequest?.SrNumber is used because ServiceRequest is the parent
 // object of Messages. To access the other possible field names, expand the trigger box, click on fx,
 // click on Fields, and select the drop-down list from Message. Click on Service Request to see the
 // available fields. You must click Insert to correctly insert the appropriate field into your script.

 def messageText = "A customer entry was received for " + ServiceRequest?.SrNumber
 def recipientPartyId = ServiceRequest?.AssigneeResourceId
 if (recipientPartyId) {
 // Call to send notification
 adf.util.sendNotification(adf, messageText, recipientPartyId)
 //Log a confirmation that the notification has been sent. Logs can be viewed in 'Runtime Messages'.
 //println("Notification sent to " + recipientPartyId + " because a customer entry was received.")
 } else {
 println("No Assignee associated with this SR")
 }
 } catch (e) {
```

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```
// Log the failure in groovy logging. Logs can be viewed in 'Runtime Messages'.
println("Failure to trigger notification from Groovy Script " + e.getMessage());

// Throwing validation exception will show the message on the UI. This is not recommended for published
 sandboxes.
// The following code is one of many to illustrate identifying an error in trigger from UI.
// Replace <triggerName> with the trigger name you specified when creating this trigger.
// throw new oracle.jbo.ValidationException('Failure to trigger <triggerName> Notification from Groovy
 Script: ' + e.getMessage())
 }
}
```

How do I manage assignment objects?

You need to select attributes from the service request (SR) assignment object that you want to make available in your rules. But note that this procedure is optional, because ready-to-use fields are already provided for all the objects.

> **Note:** You must not change the configuration for any of the ready-to-use objects. If you change the configuration, the Service Request Queue Assignment process can't run successfully. But you can add new attributes or new child entities for the objects.

(Optional) To manage SR assignment objects:

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

    - Offering: Service

    - Functional Area: Communication Channels

    - Task: Manage Service Assignment Objects

2. On the Manage Service Assignment Objects page, add the queue attributes that you want to be available when you're setting up your rules:

    a. Click **Queue**.
    b. Click the **Attributes** tab.
    c. Add attributes to the list by clicking the **Plus** icon, and then selecting the **View Object Attribute** from the drop-down list.
    d. Click **Save**.

3. Add the service request attributes that you want to be available when setting up your rules:

    a. Click **Service Request** .
    b. Click the **Attributes** tab.
    c. Add attributes to the list by clicking the **Plus** icon, and then selecting the **View Object Attribute** from the drop-down list.
    d. Click **Save**.

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How do I manage assignment rules?

Let's go over how you define the rules for service assignment.

Here are some guidelines that you need to follow when you're defining matching rules for assigning work items to queues:

- You must define the rule set with Number of Candidates = 1. The application enables only one queue to be assigned to a service request (SR).

- You've the option to select or deselect the Use Score option on a rule set. If you select Use Score, then for every rule in the rule set, you must indicate the amount to increase the score when the rule is true. You must then associate the rule set to queues that receive that score. All the rules in a rule set are executed, and the queue with the highest total score is selected.

- If the rule set has multiple rules and you didn't select the Use Score option, you must define the criteria for each rule to be mutually exclusive from other rules in the rule set. This ensures that the resulting queue assigned by the application is predictable in all situations.

You can use the operators listed in this table to define the conditions for SR assignment rules.

Operator	Description	Value	Used in hierarchy?	Example
Equals	The value of a field equals a specific value.	Single	No	If the rule condition is set as *Service Request Severity Equals High*, only an SR with the severity value of High matches the condition.
Does not equal	The value of a field doesn't equal a specific value.	Single	No	If the rule condition is set as *Service Request Severity Does not equal High*, an SR with severity value of Low or Medium matches the condition.
In	The value of a field is one of a list of values.	Single or Multiple	No	If the rule condition is set as *Service Request Problem type Code In Docs, Product*, an SR with the problem type code value of Docs or Product matches the condition.
In including children	The value of a field is one of a list of values. Indicates that the rule applies if an attribute value matches to any of the attributes in the parent-child hierarchy of the current attribute.	Single or Multiple	Yes	If the rule condition is set as *Service Request Product Group In including children Apple*, any SR with the Apple product group or any of its children, such as iPhone, iPhone 6s, iPhone 7, iPad, iPad1, and iPad 2 match the condition.

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Operator	Description	Value	Used in hierarchy?	Example
Not in including children	The value of a field isn't in a list of values. This value is only relevant for category or product fields that are hierarchical. Indicates that the rule applies if the specified attribute value matches the top level of the attribute. This option doesn't include the attribute values of the children of the current attribute.	Single or Multiple	Yes	If the rule condition is set as *Service Request Product Group Not in including children iPad*, an SR with the Product Group value of iPad or any of its children, such as iPad1 or iPad2 doesn't match the condition. However, an SR with the Product Group value of Apple, iPhone, or iPhone 6s matches the condition.
Not in	The value of a field isn't in a list of values.	Single or Multiple	No	If the rule condition is set as *Service Request Problem Type Code Not in Docs, Product*, an SR with the problem type code value of User doesn't match the condition. However, an SR with a problem type code of Docs or Product is a match.
Is blank	The value of a field doesn't contain a value.	N/A	No	If the rule condition is set as a *Service Request Internal Priority Code Is blank*, an SR without an internal priority code value is a match.
Is not blank	The value of a field contains any value.	N/A	No	If the rule condition is set as *Service Request Account Is not blank*, an SR with an associated account is match, but not an SR without an account.

To manage SR assignment rules:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Service
    - Functional Area: Communication Channels
    - Task: Manage Service Assignment Rules
2. On the Manage Service Assignment Rules page, select a **Category** based on the following.
    - **Generic Queuing Rules**: Rules set for all types of work items.
    - **HR Service Request Queuing Rules**: Rules set for HR Help Desk SR.
    - **Service Request Queuing Rules**: Rules set for CRM SR.
3. Create a new rule set by clicking the **Plus** icon in the **Rule Sets** work area, and then enter the required information.

4. Create rules for the rule set by clicking the **Plus** icon in the **Rules** work area.
5. In the **Create Rule** window, enter a name for the rule in the **Name** field.
6. From the **Rule Applies If** drop-down list, select **Any conditions met**.
7. Add a condition by clicking the **Plus** icon in the **Conditions** work area, and then define the required attribute.

    If an attribute is hierarchical, such as Category Name and Product Group, **Not In Including Children** and **In Including Children** operators are displayed as choices. For more information about the operators, see the table with the list of operators.
8. (Optional) Add more conditions.
9. In the Action: Assign Queue region, click the **Plus** icon to select a queue.
10. In the **Select and Add Queue** window, search for and select a queue.
11. Click **OK**.
12. Click **Save and Publish** to publish the assignment rules.

The service assignment has been defined.

> **Note:** You must republish the assignment rules each time the rule is changed. Also republish the rules each time the associated queue is deleted, enabled, or disabled.

How can I give users access to create parts orders using service requests?

Service Logistics users access the Fusion Service UIs to order parts to complete a service request or work order. See related topic for instructions on granting users access to the Service Request and Work Order UIs so that they can create parts orders.

To view the table and column details which carry part details from the SR page, see the related link for the Parts Requirements Lines table.

Related Topics
- Give Users Access to Fusion Service UIs
- Parts Requirement Lines

How do I enable deep links to KM articles in outbound emails?

When your service agents reply to customers by email, they might sometimes need to add links to Knowledge Management (KM) articles or other related service requests (SRs). These articles can help resolve the issue faced by the customers in that SR, or they can provide more information.

These internal links to KM articles work in the SR Messages tab. But for these internal links to work in emails sent to customers, they must be translated to external links that open on the customer service application.

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Your customers typically have access to one or more customer service applications. These customer service applications provide them access to their SRs and relevant knowledge articles through a web interface. They might use multiple customer service applications for various reasons. For example, customers often use different customer service applications for different business units (BUs).

Here's what you need to do to convert the internal links to external links that open in the customer service application:

- Enable the SVC_ENABLE_DEEPLINKS_IN_OUTBOUND_EMAIL profile option.
- Use the Manage Service Request Dynamic Links task to configure the **External URL** field, as described in the following table.

This table shows how the links work, depending on how the agent links to the article.

Type of link created to the KM article	What to append to the external URL to make the link work	How the link works

Article link format:
 	
When the agent uses either the "Insert as link" in RHP or the "Insert Knowledge" button KM application.
	`?`
	`kmContentId={0}&page=shell&shell=know`
	`article`
		The parameter {0} is replaced by the internal document ID of the selected KM article, and a clickable link to the article is inserted in the email message. The title of the KM article is used as the label for the link.
		
		The article opens in the customer service application in a separate nested tab.

Knowledge article format:
 	
When the agent composes a message and provides a reference to a KM article. For example, if the agent types in the text FAQ1234, this text is linked in the email message.
	`?`
	`kmExternalId={0}&page=shell&shell=kno`
	`article`
		The parameter {0} is replaced by the internal document ID of the selected KM article. The article is linked by using the typed text as the label for the link. Example of typed text: FAQ1234.
		
		The article opens in the customer service application in a separate nested tab.

Note: The deep links don't work if they contain the # character. Also, special characters such as @, ^, and * can be used only if preceded with the backslash character \. For example, you must use * instead of * in your regular expression. For more information about using special characters in regular expressions, see the open source documentation for regular expressions. After you change the regular expression, remember to use a validator to ensure that it's still working.

To enable deep links to KM articles in outbound emails and email previews to open in the customer service application:

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

   - Offering: Service
   - Functional Area: Productivity Tools
   - Task: Manage Service Request Dynamic Links

   Note: Optionally, you can search for the Manage Service Request Dynamic Links task from the Tasks panel tab in the Setup and Maintenance work area.

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2. On the Manage Dynamic Links page, repeat steps 3 to 12 for each of the business units (BUs) for your deployment.

   That's because you might have different customer service applications for different BUs. If you only have a single BU, you need to do the steps only once.

3. Select the row that has **ARTICLE_LINK** in the **Object Type** field.

4. Click **Add** to add a row.

5. From the **Business Unit Name** drop-down list, select a BU.

6. In the **External URL** field, do the following:

   a. Enter the external URL provided to you.

   b. Append the following string at the end, after the slash: `?kmContentId={0}&page=shell&shell=knowledge-article`

   This string is explained in the first row of the table.

   Example of how the final URL looks: `https://myvbinstance.builder.ocp.oc.com/ic/builder/rt/KMEXTID297/1.0/webApps/dcs/?kmContentId={0}&page=shell&shell=knowledge-article`

7. Click **Save**.

8. Select the row that has **KNOWLEDGE_ARTICLE** in the **Object Type** field.

9. Click **Add** to add a row.

10. From the **Business Unit Name** drop-down list, select the same BU as in step 5.

11. In the **External URL** field, do the following:

   a. Enter the external URL provided to you.

   b. Append the following string at the end, after the slash: `?kmExternalId={0}&page=shell&shell=knowledge-article`

   This string is explained in the second row of the table.

   Example of how the final URL looks: `https://myvbinstance.builder.ocp.oc.com/ic/builder/rt/KMEXTID297/1.0/webApps/dcs/?kmExternalId={0}&page=shell&shell=knowledge-article`

12. Click **Save**.

Add Deep Links to Third Party Applications from Service Request Messages

You can add custom object types and provide dynamic links to third party applications within the service request message content. The user can drill down directly from dynamic links in a service request message into specific records in non Fusion applications.

You can define regular expression patterns that convert to a URL link, when the user types text matching that pattern. For example, when a user types text matching the pattern for a service request reference, the text in the SR message is automatically converted into a link to that SR. This means that a user can, for example, type in `FAQ123`, `SR123`, or `Bug123`, and if the pattern matches, it creates a link in the SR message, to the corresponding FAQ knowledge article, SR, or bug tracking application.

Here's how you configure the third party link for custom objects:

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

   ○ Offering: Service

   ○ Functional Area: Productivity Tools

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      o Task: Manage Service Request Dynamic Links

2. On the Manage Dynamic Links page, click **Add**.

   The **Add** dialog box is displayed.

3. In the **Object Type** field, enter a name for the custom object (for the third party application) you want to create.

4. To automatically generate dynamic link patterns for links that point to the third party application, select the **Generate pattern** check box.

   Use this option in case you aren't sure how to reference an object. You can't edit this pattern.

5. Click **OK**.

6. Select the custom object row you added, and click **Add**.

7. From the **Business Unit Name** drop-down list, select a BU.

8. In the **External URL** field, enter the URL that's needed to deep link on the selected custom object.

   The external URL should also contain `{1}`, which is the parameter that's replaced with the text or number adhering to the pattern.

   For example, if you add a pattern such as `(?i)\b(txt)([0-9]{3})\b` that opens in a URL such as `<a target="_blank" href="https://abc.com/edit_info?rpt=txt123">https://abc.com/edit_info?rpt=txt123</a>`, then the external URL should be `<a target="_blank" href="https://abc.com/edit_info?rpt=">https://abc.com/edit_info?rpt=</a>{1}`

9. In the **Internal URL** field, enter the internal URL for the third party application (for the selected custom object).

10. Click **Save**.

> **Note:** To delete a custom object type, click **Delete** (the X icon) for the corresponding row. You can't delete the ready to use object types such as service request, article link, and knowledge article.

Here's some more examples that show how to configure other deep links:

- SRs:
    - Pattern: `(?i)\b(SR)([0-9]{10})\b`
    - External URL: `https://<fusion application URL>/deeplink?objType=SVC_SERVICE_REQUEST&objKey=srNumber%3D{0}&action=EDIT_IN_TAB`
    - Internal URL: Not applicable

- HR Help Desk articles:
    - Knowledge_Article (for example, `HFAQ123`): `https://<fusion application URL>/deeplink?objType=CSO_ARTICLE_CONTENT_HCM&objKey=docId%3D{0}%3Blocale%3D{1}&action=EDIT_IN_TAB`
    - Article_Link (for example, `HFAQ123`): `https://<fusion application URL>/deeplink?objType=CSO_ARTICLE_CONTENT_HCM&objKey=articleId%3D{0}%3Blocale%3D{1}&action=EDIT_IN_TAB`

What are the prerequisites for survey integration using SurveyMonkey?

Throughout this chapter, we used SurveyMonkey as the example for the third-party survey supplier. If you're using SurveyMonkey, you must follow these steps prior to using the Survey Integration Framework with SurveyMonkey.

Create a paid SurveyMonkey account and create a Private App

You can create a free account and then upgrade to a paid plan, or upgrade your existing free account.

1. Go to https://developer.surveymonkey.com/apps/ and create an account.
2. Log in to SurveyMonkey.
3. Go to My Apps and create a new Private App.
4. Review the credentials and select the scope items used in your scenario. You can change this at any time.

Check your current API call limits

SurveyMonkey imposes a daily limit on the number of API calls. Therefore, there is a limit to the number of surveys you can send in a day. SurveyMonkey's documentation explains API call maximums. You must license your SurveyMonkey account appropriately for all connections over their defined limits, so make sure you have purchased enough API calls.

> **Note:** SurveyMonkey monitors your API calls and if you exceed your limit, you're notified through email to upgrade your plan.

To check your API call limits:

1. Log in to SurveyMonkey.
2. Find your App and click the App name.
3. Click the Overview tab to see your API limits.
4. To adjust your API call limits, send an email to: **api-support@surveymonkey.com**

Can I use surveys?

The survey integration framework lets you start survey requests based on any object.

You can send surveys from your preferred third-party supplier to your customers based on your chosen rules. You can define who receives a survey, what survey should be sent, and when to send a survey.

The survey integration framework connects with your survey supplier using Oracle Integration Enterprise Edition.

The following graphic shows the set up steps you'll need to perform to integrate the survey framework.

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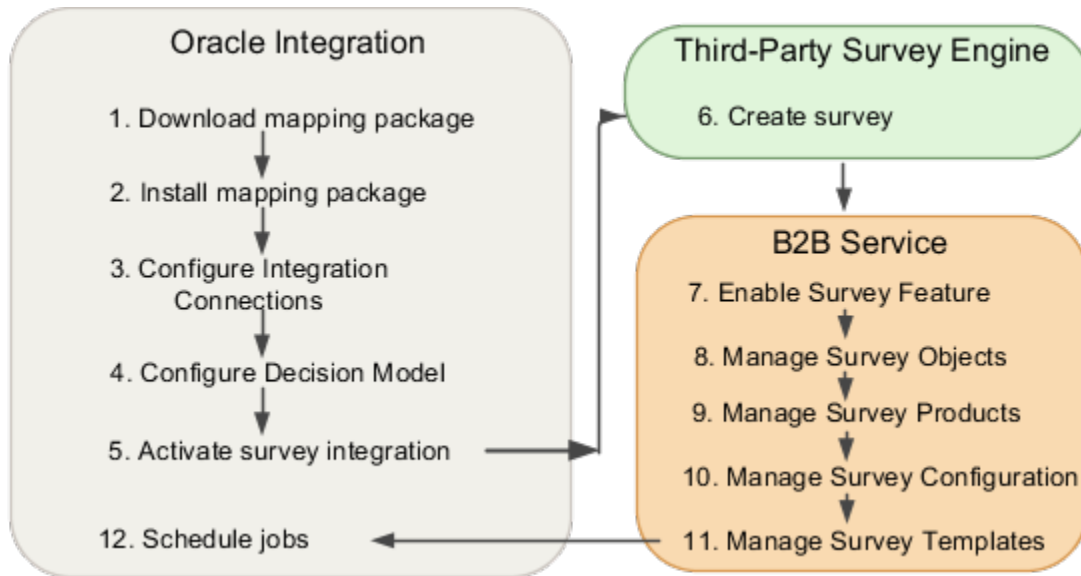
What happens to closed service requests?

Service requests (SRs) can be closed only by an internal process. You can't manually set the status of an SR to Closed.

> **Note:** If you want any SRs to be closed automatically, you must contact your administrator.

After an SR is closed, you can't edit the SR, add a message, or reopen it.

How do I implement user groups in Knowledge?

You can use both predefined user groups and custom user groups that you create. In either case, you need to understand and set up the following to make effective use of user groups in Knowledge.

> **Note:** This answer is applicable to both Fusion Service Knowledge Management with Redwood and Classic User Experience.

In security model terms, a user group is like a privilege, which you define in a data security policy (DSP) within a role. You add users to user groups by assigning them to roles that contain user group data security policies. We recommend that you create new roles when you set up user groups.

User groups are also specific to a department, or application. When you create a role to grant access to a user group, make sure that it also grants access to the department, or application, that the group belongs to.

Here are the basic tasks to set up a user group:

- Create a new role. You can create a new role or copy an existing role and modify it to your needs.

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- Add a department data security policy. You can add one or more department DSPs based on your access requirements.

- Add a user group data security policy. You can add one or more user group DSPs based on your access requirements.

- Assign the role to users. You can assign the role to individual employees or groups of employees and set up autoprovisioning to automatically assign the role to new employees, as necessary.

Note: When creating an article, the author must add at least one user group to the article. If you use a REST API to create or update an article without a user group, the application automatically assigns the Everyone user group. If you add the Everyone user group to an article, you cannot add any other group.

How do I enable Service Center?

To enable Service Center functionality and user interface, you just need to opt-in from Fusion Service.

Note: Once you opt in to the Redwood User Interface for Service feature to enable the Redwood UI make sure to then click the pencil icon to ensure that the Service Center sub features are also enabled. There are two sub features to review are Service Requests for Redwood User Interface and Work Orders for Redwood User Interface. These separate sub features allow the administrator to control whether each set of object-related pages should be enabled in Redwood.

Here are the steps:

1. Sign in to the application as an administrator or setup user.
2. Click **Navigator > My Enterprise > Offerings**.
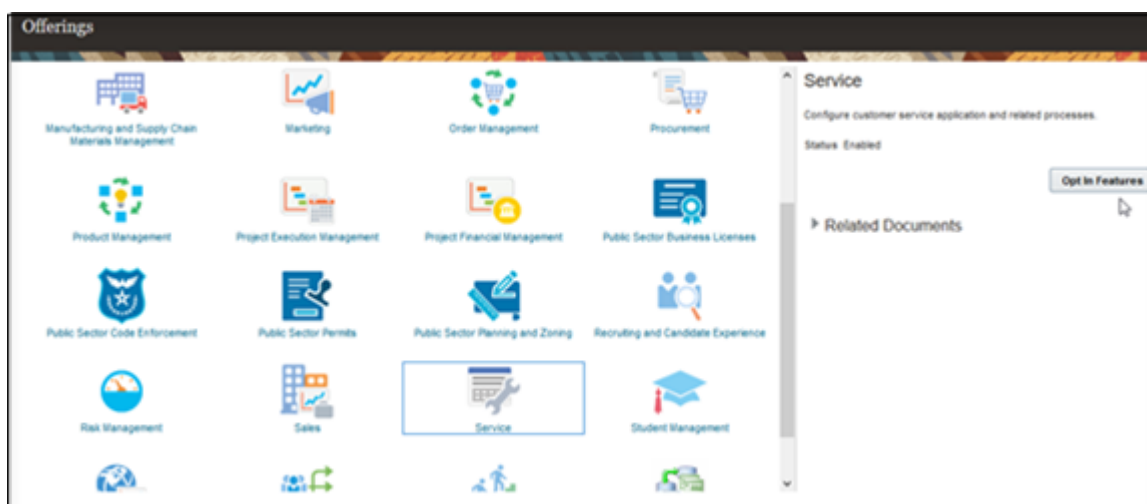
3. On the Offerings page, select the **Service** offering.
4. Click the **Opt In Features** button.
5. On the **Opt In: Service** page, review the functional areas, such as Service Requests, Channel Communication and so on.
6. Scroll through the list until you locate **Redwood User Interface for Service**.

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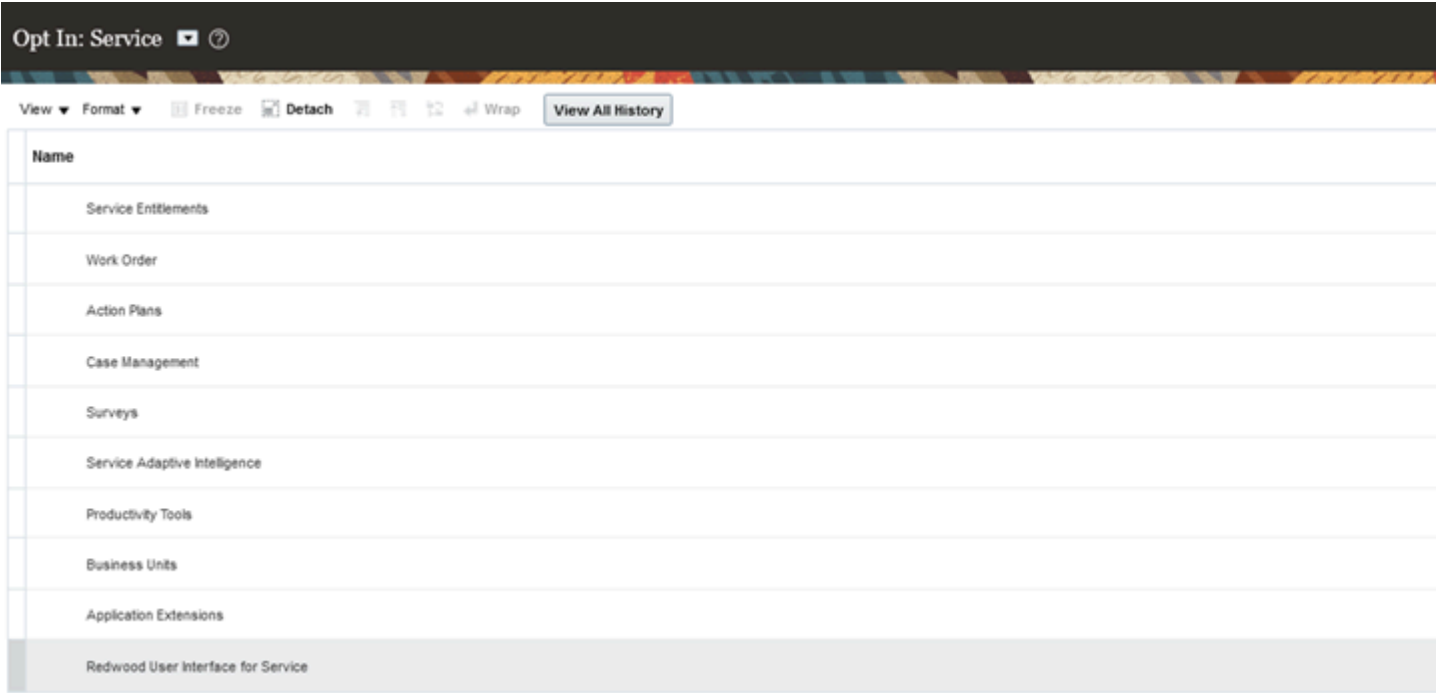
7. Select **Enable**.
8. Click the **Features** (pencil) icon.
9. On the Edit Features: Redwood User Interface for Service page, enable all child features.
10. Click **Done**, and then on the Opt In: Service page, click **Done** again.

     Your users can now access Service Center including Work Orders (Next Generation).

What are the ready-to-use privileges and roles?

The following privileges are ready-to-use with the following default job roles: Customer Service Representative and Customer Service Manager:

> **Note:** The View Service Center privilege only grants users the ability to access each of the Redwood Service Center pages. Within each page, the more detailed functionality is controlled by existing functional privileges, most of which apply to both the Visual Builder and ADF UI pages concurrently. Any custom roles you may have created also require you to add the SVC_USE_SERVICE_BASE_APP privilege to allow that role access to Service Center.

The following table shows the ready-to-use privileges.

> **Note:** In case you don't find the privileges in Security Console, run the **Import User and Role Application Security Data** process from **Navigator > Tools > Scheduled Processes**.

Privilege	Privilege Code
View Service Center	SVC_VIEW_SERVICE_CENTER_PRIV

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Privilege	Privilege Code
View Navigator Menu	ORA_ZCA_VIEW_NAVIGATOR_MENU_PRIV
View Smart Actions	ZCA_VIEW_SMART_ACTIONS_PRIV
View Named Routes	ORA_ZCA_GET_NAMED_ROUTES_PRIV
Manage Installed Base Assets	SVC_MANAGE_INSTALLED_BASE_ASSETS_PRIV
Open Objects in Dynamic Tabs	SVC_OPEN_OBJECTS_IN_DTNT

Note: If you're using custom roles, it's recommended that you add the following duty role as a child of your custom role: Conversation Message Management (ORA_SVC_CONV_MESSAGE_MANAGEMENT).

The privileges shown in the table enable users to access a new link in the Home Page and Navigator within the Service grouping called Service Center. If you've previously created your own roles, you must use Security Console to add these privileges to your roles.

The following table shows two more privileges required for Service Center for the Redwood User Experience. You must create a custom role or use an existing custom role and manually add these two privileges to the custom role.

Privilege	Privilege Code
Use Service Base App	SVC_USE_SERVICE_BASE_APP
Navigate to Service Center Pages from Notification	SVC_NAVIGATE_TO_SERVICE_CENTER_FROM_NOTIFICATIONS_PRIV

To expose the **Cases** feature, use Security Console to provide the following roles to your users:

- Case Manager: ORA_SVC_CASE_MANAGER
- Case Worker: ORA_SVC_CASE_WORKER

How do I add, hide, or rearrange fields?

This is a worked example on how you work with form fields in VB Studio. You can add, hide or rearrange the order of fields. As with previous examples, we'll use Create Service Request.

1. In the Rule Set editor, from the Dynamic Form list, select the **Create Service Request** form.
2. Duplicate the layout, then select the duplicate record.
3. Click the **Open** icon.

   The layout is displayed with its included fields, and in the explorer, all available fields.
4. To add a field, click the check box of any field shown in the field explorer.

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The added fields, including custom fields added with Application Composer, will appear at the end of the layout.

5. To reorder fields, click the control beside the field, and drag the field to where you want it to go in the layout order.

The following screen capture shows the control you use to drag and drop fields in the layout.
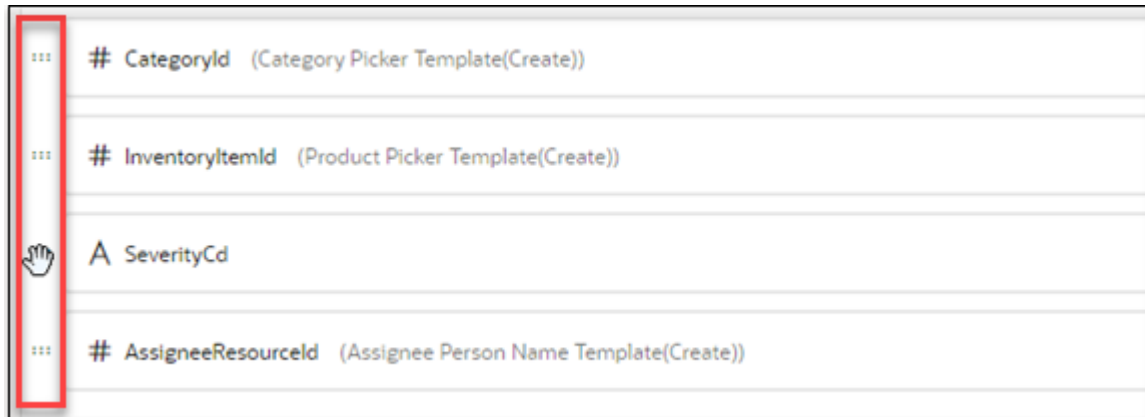
6. To hide a field either deselect the field in the field list, or hover in the field in the layout and click the **X**.

How do I add a read only custom field using VB Studio?

Now, we'll create and add a custom field in VB Studio then add it to a layout. For this example, we'll be creating a custom field based on the SR severity.
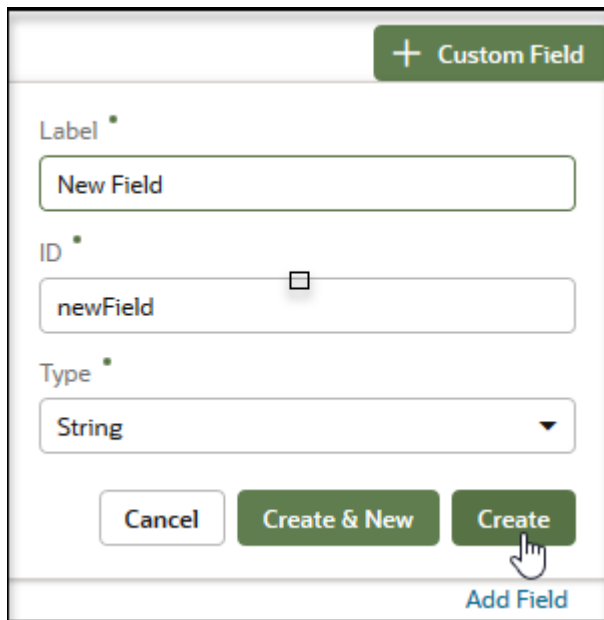
> **Note:** Custom fields created in VB Studio are read only. To create a custom field that will retain changes to the database, you must use Application Composer. To create a custom field in Application Composer, see *How do I create a custom field?*.

1. In the Applications Extensions explorer, navigate to **App UIs > Oracle Fusion Service UI Extension App > Service > ec > sr > edit**.

Remember, we're using the Service Request layout for this exercise.
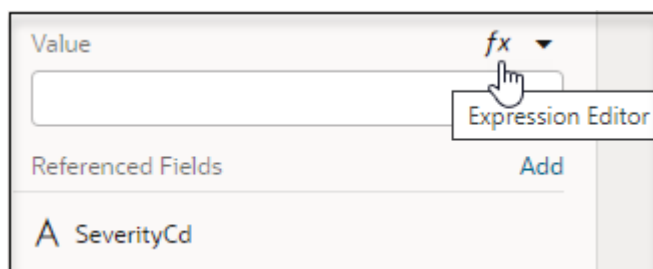
2. Click the **Fields** tab.

3. Click the **+ Custom Field** button.

4. In the **Custom Field** dialog box, enter the field name that you'd like reflected in the UI.

5. Click **Create**.

6. From the list of fields, select the newly created custom field.

7. In the Properties pane, add referenced fields by doing the following:

    a. Click the **Add** link for the Referenced Fields property.

    b. In the **Referenced Field** text field, start entering the word and then choose the **SeverityCd** field from the results that appear and then click **Add Field**.

8. Now, click the Expression editor:

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9. Now in the Expression Editor, set the conditions that govern when the field is displayed by doing the following:

    a. From the Context explorer, expand the fields list.
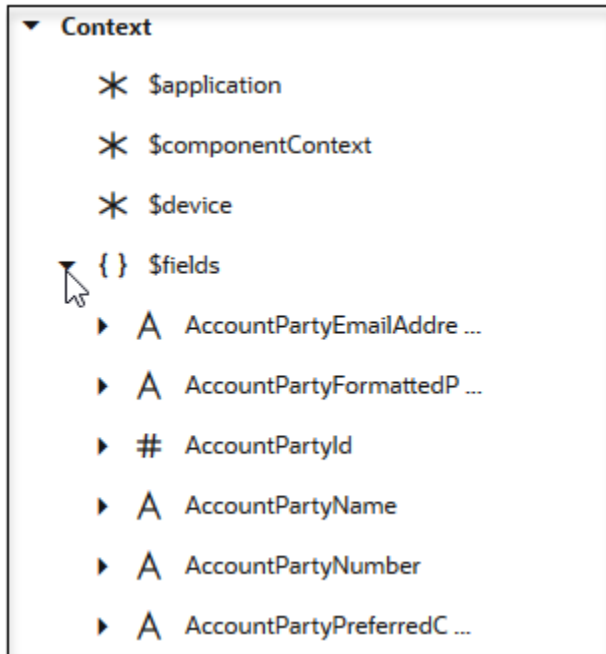
    b. Find the **SeverityCd** field in the list, expand it, and drag **value** into the editor.

    c. Add the following to the expression: `==='ORA_SVC_SEV1'?'High Severity SR':'Not a high Severity SR'`

```
1    $fields.SeverityCd.value()==='ORA_SVC_SEV1'?'High Severity SR':'Not a high Severity SR'
```

    d. Click **Save**.

       Now the custom field will only display if and value has a severity code of 1.

10. Click **Rule Sets** to return to the layout.
11. In the Fields explorer, enter the name for the custom field.
12. Click the check box to include the field in the layout.
13. Drag the field to where you want it to appear in the UI.
14. Use the Field properties window to choose one of the default templates from the **Template** drop-down list.
15. Click the **Create** link to create your own template.
16. Click the **Preview** button to view your changes.

    Details on creating a template are in the *Create Your Own Field Template* topic in this chapter.

How do I make a field read only or required?

This task shows you how to set properties on a dynamic form to make its fields read only or conditional. For this example, we'll use the Create Service Request layout.

Note: Required and Read Only are only available if a field in a layout isn't associated with a template.

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First duplicate the default form if necessary, or choose your own layout, and then do the following:

1. Select the layout.

   The layout is displayed with the fields shown.
2. Note the **Read Only** and the **Required** check boxes in the Form properties area.
3. To make the field read only, simply click the **Read Only** checkbox.
4. To make the field required, just click the **Required** checkbox.
5. To make a field conditionally required, do the following:

   a. Hover over, and then click the **Expression Editor**.
   b. Select a variable from the drop-down list.
   c. To edit the conditions of the variable, hover over then, select the **Expression Editor**.
   d. In the Expression Editor, expand the **fields** variable list.
   e. Expand the SeverityCd variable and drag **value** on to the editor workspace as shown in the following example:
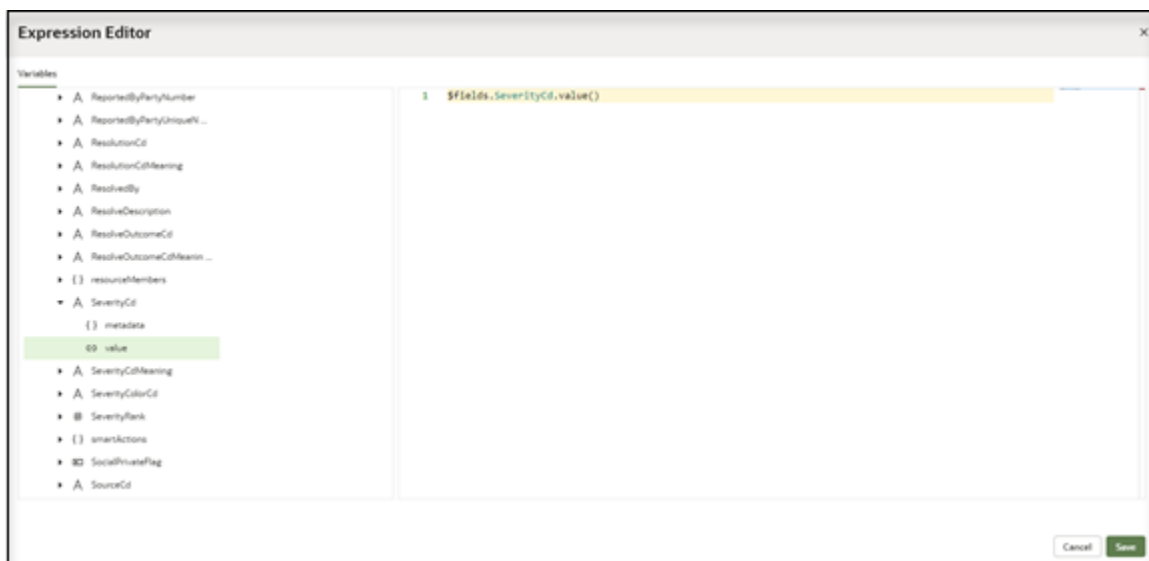
   f. Add the following value to the expression: `=== 'ORA_SVC_SEV1'` .
   g. Click **Save**.

   Now the field only displays when severity level 1 is reached

How do I add conditions to a form using VB Studio?

In this example, we'll add a condition that specifies that a form displays only if a certain SR severity level is reached. First duplicate the layout, or choose your layout, then do the following:

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1. Click the **Click to add condition** link.
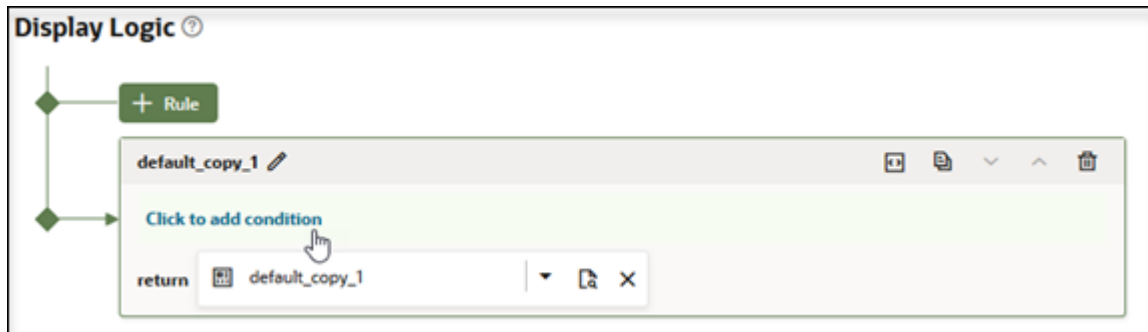
2. From the **Attribute** drop-down list, select the severity code value: `$fields.SeverityCd.value()`, then in the Value field, enter: ORA_SVC_SEV1 as shown in the following example:
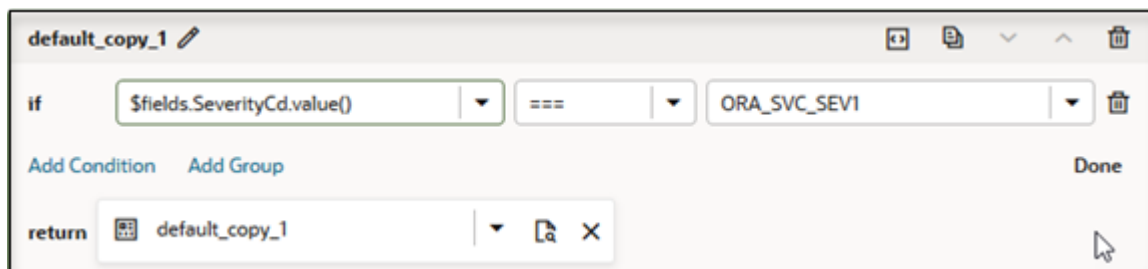
Now the layout will only display when a service request has a severity code value of 1.

Example of Making a Layout Visible Based on Category Conditions

Here's an example of how to make your layout visible when using category conditions:

1. In the categoryId field add the value within single quotes as follows:

   $fields.CategoryId.Value() === '123'
2. For the categoryName field to display, you must expose it in one of the create layouts.
3. Create a dummy layout and expose **categoryName** and use the category Name value in the conditional rendering.

   For example:

   `$fields.CategoryName.Value() === CategoryName Document URL and section`

How do I use 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.

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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 service 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. Ensure that you're on one of the Service Center pages.
2. Click **Notifications** (the bell icon) to view all bell notifications.

   The **Notifications** window is displayed.

3. Do any of these:

   - Search for notifications by keyword.

   - Click a notification link to take further action on that record. You can drill into a service request's details. For example, clicking on a notification about a service 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.

> **Note:** If you want SR notifications sent when assignments take place, you must implement a Groovy script to enable this functionality. See *How do I use Groovy script to notify an agent that a service request has been assigned?*.

Omnichannel Notifications

The application routes your multichannel notifications, all with the same look and feel. Here's how the different types of multichannel notifications work.

- Interactive (real-time) notifications, such as incoming phone calls offers.

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You can accept or decline these notifications. If you don't take any action, the chat offer times out. You can receive single or multiple chat offers. Multiple chat offers are stacked up.

- A desktop or toast notification is displayed if you don't have the Service Center Redwood interface in focus on your desktop.

How do I close a service request?

Here's how you can resolve a service 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 Service 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. For example, when resolving a service request where a knowledge article helped solve it, select the following values for steps 5, 6, and 7.

4. From the **Status** drop-down list, select **Resolved** (selected by default).
5. From the **Outcome** drop-down list, select **Solution Provided**.
6. From the **Resolution** drop-down list, select **Knowledge Article**.
7. From the list of knowledge articles (if some knowledge articles are already linked to the service request), select the articles that resolved the service request.

   > **Note:** The list of linked knowledge articles is displayed only when you select **Solution Provided** outcome and **Knowledge Article** resolution.

8. 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.
9. Click **Resolve**.

How do I update service request fields?

You can update SR fields from the **Action Bar**. Enter **update** to view a list of individual fields you can update. Here's a list of the fields you can update for a service request:

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Action	Description
Update Account	Change the account associated with the service request.
Update Asset	Change the asset associated with the service request. • If you select an account for the service request, then you can select an asset for that account. • If you don't select an account but associate a contact with the service request, then you can pick an asset for the contact. • If you don't select an account or a contact, you can't select an asset.
Update Assigned To	Change the agent to whom the service request is assigned.
Update Category	Change the category of the service request.
Update Critical	Specify whether the service request is critical or not critical.
Update Primary Contact	Change the primary contact associated with the service request.
Update Problem Description	Change the problem description of the issue. You can insert SmartText by typing # to display a list of plain SmartText entries, and type-ahead to progressively search and filter this list.
Update Queue	Change the queue to which the service request is assigned.
Update Related Objects	Change the relationships between two associated service requests and cases.
Update Severity	Change the severity of the service request.
Update Status	Change the status of the service request.
Update Title	Change the title of the service 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 service request:

Action	Description
Compose Email	Start a new email conversation with a customer. Messages created using this action are sent as an email to all the recipients on the message.

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Action	Description
Compose Internal Note	Create an internal note in the service request. You can use internal notes to save any notes on the service request, such as research work you've done to resolve a service request. Internal notes aren't visible to customers in the customer portal or to partners.
Compose Web Message	Send a message to a customer on the customer portal. The customer contact can see the web messages by signing into the customer portal.
Capture Customer Message	Capture what the customer has reported to you about the service request. You should use this action only if you aren't using the typical ready-to-use channels such as telephony or email integration. Messages or comments created by customer contacts using the customer portal also show up as customer messages.
Compose Message	Use this action if you've defined your own channel types and want to create a message of type response, using that channel type.
Start Internal Conversation	Start a new conversation with an internal user. Use this action to contact internal users for help in resolving the service request. In an internal conversation, you can contact other users using these channels: Email, Slack, Microsoft Teams, Web.

Compose Email

To send a new email (start a new email thread):

1. Open the Service Request Overview page for the service request for which you want to send an email.
2. In the **Action Bar**, enter **Compose**.

   You can also enter the synonym **Send**.
3. From the list of suggested actions, select **Compose Email**.

   The **Compose** panel is displayed.

   > **Note:** The channel type is selected as **Email** by default.

4. In the **To** field, enter, or search and select the email recipients by typing a few characters and selecting the recipients from the list.

   - If a primary contact exists for the service request, it's populated in the **To** field by default.

   - You can optionally select other recipients from the **Cc** and **Bcc** fields.

   - You can also add external recipients that aren't displayed in the list.
5. In the **Subject** field, enter the email subject.
6. Enter the email content.

   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.

7. To add an attachment to your message, drag the file you want to attach.

> **Note:** If your administrator has set the ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY, ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE, and SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS profile options to **Yes**, images and logos (in the sender's signature) are displayed inline within the body of the service request message. They won't show up as regular service request attachments.

8. To preview your email before sending it, click **Preview**.
9. To save your email as a draft message, click **Save as Draft**.

   The draft email is displayed in the **Pending** region.

   a. To edit your draft email, click **Edit Draft**.
   b. To delete your draft email, click **Delete Draft**.

10. Click **Send**.

   All incoming and outgoing interactions are recorded, and displayed in the activity feed for the corresponding record.

To reply to an email or follow up to one you sent:

1. Go to that email in the activity feed:

   o Click **Reply** when the last message in the email thread has a single recipient (To, Cc, and Bcc included).

   o Click **Reply All** when the last message in the email thread has multiple recipients (To, Cc, and Bcc included).

   When you reply to a message, it's added as a child of the message you're replying to, so that all messages in the email thread are grouped together as conversations.
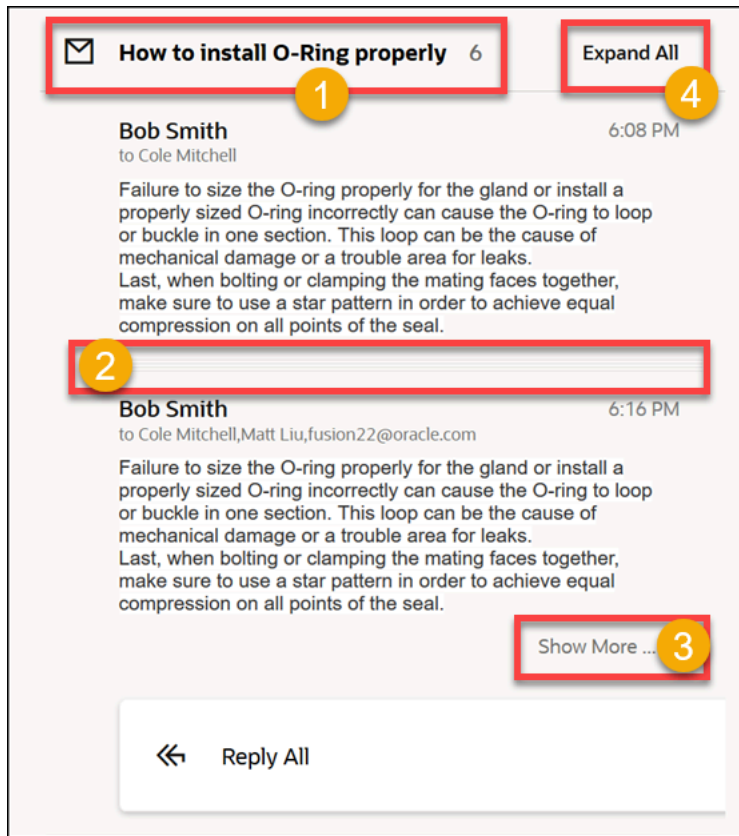
   > **Note:**
   > o If you preview your reply, the preview includes all past conversations in the email thread, up to the email you're currently replying to.
   > o If you save your reply as a draft message, it's displayed in the activity feed itself, and it's highlighted as **Draft**. You can edit or delete the draft email later. You can only have one draft message for each email thread.

2. Compose your reply and click **Send**.

In the activity feed, by default, up to 4 emails in an email thread are displayed fully. When there's 5 or more emails in an email thread, the first and last emails are displayed, with the other emails collapsed. The total number of emails in the email thread is specified on the email message header (callout 1 in the screenshot). Here's the different ways to expand the messages in the email thread:

- In an individual message that's contracted, click **Show More** to view the complete message (callout 3).

- To expand up to 5 emails in the email thread, click the email message header. The first 4 emails and the last email in the thread are displayed, with the other messages collapsed. To expand the remaining messages, click the double lines between the messages (callout 2).

- To see the entire email thread along with each individual message fully expanded, click **Expand All** on the email message header (callout 4). Once you've expanded the entire email thread, you can click **Collapse All** to collapse it.

Compose Internal Note

To post an internal note:

1. Open the Service Request Overview page for the service request for which you want to post an internal note.
2. In the **Action Bar**, enter **Compose**.
3. From the list of suggested actions, select **Compose Internal Note**.

   The **Compose** panel is displayed.
4. Enter your notes.

   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.
5. To add an attachment to your message, drag the file you want to attach.

   > **Note:** If your administrator has set the ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY, ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE, and SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS profile options to **Yes**, images and logos (in the sender's signature) are displayed inline within the body of the service request message. They won't show up as regular service request attachments.

6. Click **Post**.
   All internal notes are recorded, and displayed in the activity feed for the corresponding record.

You can edit the internal notes you've created, if your administrator has set the SVC_ENABLE_MESSAGE_CORRECTION profile option to **Yes**. Here's how you do it:

1. Go to your internal note in the activity feed.
2. Hover over the internal note header and click the **Edit** (pencil) icon.
3. Update your notes and click **Save**.

Compose Web Message

To send a web message:

1. Open the Service Request Overview page for the service request for which you want to send a web message.
2. In the **Action Bar**, enter **Compose**.
   You can also enter the synonym **Send**.
3. From the list of suggested actions, select **Compose Web Message**.
   The **Compose** panel is displayed.

   > **Note:** The channel type is selected as **Web** by default.

4. Enter your message.
   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.
5. To add an attachment to your message, drag the file you want to attach.

   > **Note:** If your administrator has set the ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY, ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE, and SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS profile options to **Yes**, images and logos (in the sender's signature) are displayed inline within the body of the service request message. They won't show up as regular service request attachments.

6. Click **Save**.
   All web messages are recorded, and displayed in the activity feed for the corresponding record.

Capture Customer Message

To record a customer message:

1. Open the Service Request Overview page for the service request for which you want to record a customer message.
2. In the **Action Bar**, enter **Compose**.
3. From the list of suggested actions, select **Capture Customer Message**.
   The **Compose** panel is displayed.
4. Select the **Channel** and **Channel Type** from the drop-down lists.
5. In the **From** field, update the contact if required.
   You can enter, or search and select a contact by typing a few characters and selecting the contact from the list.
6. Enter your message.

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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.

7. To add an attachment to your message, drag the file you want to attach..

   Note: If your administrator has set the ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY, ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE, and SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS profile options to **Yes**, images and logos (in the sender's signature) are displayed inline within the body of the service request message. They won't show up as regular service request attachments.

8. Click **Save**.

   All customer messages are recorded, and displayed in the activity feed for the corresponding record.

You can click **Reply** to follow up on the customer message you captured. This creates a response message type. You can add multiple recipients and also use the **Reply All** and **Expand All** options as described in the "Compose Email" section.

Compose Message

If you've created your own custom channels, here's how you can send a message:

1. Open the Service Request Overview page for the service request for which you want to send a message.
2. In the **Action Bar**, enter **Compose**.

   You can also enter the synonym **Send**.
3. From the list of suggested actions, select **Compose Message**.

   The **Compose** panel is displayed.
4. Select the **Channel** from the drop-down list, such as email, phone and so on.
5. In the **To** field, enter, or search and select the message recipients by typing a few characters and selecting the recipients from the list.

   o If a primary contact exists for the service request, it's populated in the **To** field by default.

   o You can also add external recipients that aren't displayed in the list.

6. In the **Subject** field, enter the message subject.
7. Enter your message.

   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.
8. To add an attachment to your message, drag the file you want to attach..

   Note: If your administrator has set the ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY, ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE, and SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS profile options to **Yes**, images and logos (in the sender's signature) are displayed inline within the body of the service request message. They won't show up as regular service request attachments.

9. Click **Save**.

   All messages are recorded, and displayed in the activity feed for the corresponding record.

You can click **Reply** to follow up on the message you sent. This creates a response message type. You can also use the **Reply All** and **Expand All** options as described in the "Compose Email" section.

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How do I duplicate a form in Visual Builder?

This example, using the Create Service Request form, will show you how to extend or change a form.

> **Note:** It's highly recommended that you duplicate any form that you work with before you change or extend it.

1. Click the App UIs tab, then **Oracle Fusion Service UI Extension App > service > ec > sr > create**.
2. In the Properties pane, click the **Components** tab, and select **serviceRequests - Create Service Req**, and then click the **Open Rule Set Editor** link.
3. In the Designer, you'll see the available layouts, along with the display logic of that layout.
4. Select a layout.
5. In the Built-in layouts area, hover in the default layout, and select the **Duplicate** button.
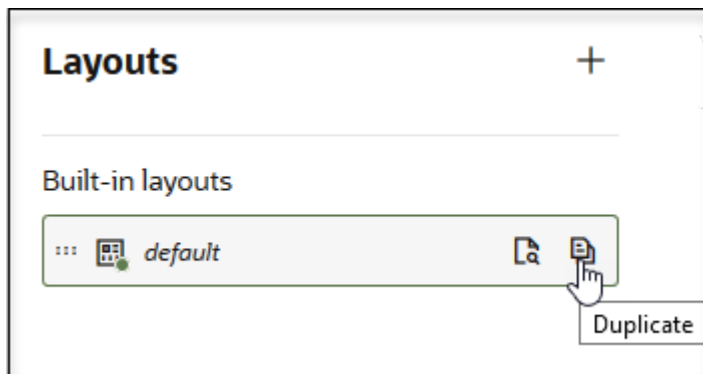
6. In the **Duplicate Layout** dialog box, enter a name for the layout and click **Duplicate**.

View Form Properties

Now let's just look at some properties of the new form. The Rule Set properties list the form's properties along with a list of templates.

1. After you duplicate the form, select it in the Designer.
2. Click the **Fields** tab to view available fields for the form.

How do I extend my application?

Your application is built using Oracle Visual Builder Studio and Oracle JET components. Visual Builder Studio is a single place where organizations can manage projects, environment and repositories; a Visual Builder Designer is where you can extend your application. From VB Studio, you can open many different designers.

Visual Builder Studio is the browser-based tool that your organization can use to make modifications and extensions to the Redwood user interface. Using the extension framework, you can change the user interface such as displaying custom fields on forms, creating dynamic layouts for a form, or embedding custom content in a dynamic container in a page.

Your VB Studio instance is paired with your Test instance of Fusion Applications. This means that your design time experience will be based on data in the Test instance database and a sandbox in the Test instance (if you're working within a sandbox).

The changes you make using VB Studio are stored in an artifact called an application extension. An application extension can be something as simple as a field added to a cloned, custom, or new form, or a new container of forms. You can create extensions, then preview them to see how they look in your UI. To create a extension that impacts the data model, you must use a sandbox within Application Composer, then use the Edit Pages in Visual Builder option to expose your changes in the UI.

You navigate to the VB Studio Designer directly from within the Redwood application. VB Studio is a **design at runtime tool**, which allows you make UI changes and then immediately preview the results before publishing the changes to other users.

VB Studio is just one tool that administrators can use to make application changes. As mentioned before, you extend the underlying object model used by the Redwood application with Application Composer. The model changes you make in Application Composer are reflected in the RESTful API for those objects, and thereby become available to the VB Studio Designer for use in UI extensions.

How do I map work order attachment fields?

The table in this topic details field mappings for attachments in Oracle Field Service. The fields are updated in Oracle Fusion Service through Oracle Integration.

Attachment Field Mapping

The following table shows the Oracle Field Service to Oracle Fusion Service field mappings for attachments.

Oracle Fusion Service Property	Data Type	Oracle Field Service Property	Data Type	Condition
Attachment	file	wo_attachment	file	Enter the allowed MIME type.
Photo	image	wo_photo	file	NA

How do I 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 service request, through various channels.

Here's how you start an internal conversation:

1. Open the Service Request Overview page for the service request where you want to initiate a conversation.

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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
Email	Send an email to the selected recipients.	Email channel **Note:** You must check with your administrator and select the appropriate email channel: o While communicating with a subject matter expert (SME), use the channel that your administrator has created for internal conversations. For example: `internal@mycompanydomain.com.` The SME's reply is sent to Conversation Message. o While communicating with a customer, use the channel that your administrator has created for conversations with customers. For example: `support@mycompanydomain.com.` The customer's reply is sent to SR Message.
Slack	Send a message to a single Slack channel, or to multiple Slack users. **Note:** o You can't send a message to the following: - Multiple Slack channels - A combination of a Slack channel and one or more Slack users. o You can send and receive attachments when communicating one-on-one with a user, or when communicating with a channel in Slack.	Slack workspace
Web	Send a message to the selected recipient within the Service Center application.	**Web**

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If the Channel Type is	Here's What You Can Do	Channel to Select

Microsoft Teams	Send a message to a single Microsoft Teams channel or to multiple Microsoft Teams users.
	
	Note:
	○ You can't send a message to the following:
	  – Multiple channels
	  – A combination of a channel and a user
	○ You can send and receive attachments when communicating one-on-one with a user, but not when communicating with a channel in Microsoft Teams.
		Select a tenant. If there's only one tenant, it will be selected by default.

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**.

How do I enable users to create an audit trail?

You can create an audit trail of changes made to service requests.

By default, only certain fields of the Service Request object are audited. If you want more fields to be audited, you must add them. You can also do an audit for the child objects by doing some configuration. Similarly, you must enable the audit for any administrator-defined child objects that you create from Application Composer.

To enable the audit for more fields or the child objects of the Service Request object:

1. Sign in to the application as a setup user or administrator.
2. Navigate to the Setup and Maintenance work area.
3. Open the Tasks panel tab and click **Search**.
4. In the **Search** window, search for and click the **Manage Audit Policies** task.
5. On the Manage Audit Policies page, click **Configure Business Object Attributes**.
6. On the Configure Business Object Attributes page, select **Service** from the **Product** drop-down list.

   All the objects that can be audited are displayed. This includes the administrator-defined objects or administrator-defined child objects for predefined entities created using Application Composer.

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For the Service Request object, the **Audit** check box is selected by default. The subset of attributes that can be audited are also displayed.

7. Click **Add**.

8. In the **Select and Add Audit Attributes** dialog box, select the check box next to the attribute that you want to add, and click **OK**.

9. To add attributes to audit for each predefined or administrator-defined child object of the Service Request object, select the check box next to the object.

> **Note:** The predefined child objects and administrator-defined child objects of the Service Request object are displayed. For each of these child objects, one or more attributes are audited by default.

10. Repeat steps 7 and 8 to add more attributes.

11. Click **Actions > Synchronize**.

12. Click **Save and Close**.

> **Note:** The audit for the Category object is enabled by default. But you can add more attributes by following the same steps as above.

How do I create unique rules?

Here are some pointers for creating unique rules:

- You must create unique rules in such a way that two different rules don't match the same work item. If multiple rules match the same work item, the Assignment Manager randomly picks one of those matching rules.

- You must also ensure that you don't have duplicate or identical rules. Duplicate or identical rules doesn't mean identical conditions. It means that multiple rules match the same incoming work item, even if the rules are defined on different fields or a combination of fields.

- If you can't create unique rules, you must put the rules in the same rule set and use scoring to identify which queue is picked by the Assignment Manager. You've the option to select or deselect the Use Score option on a rule set. If you select Use Score, then for every rule in the rule set, you must indicate the amount to increase the score when the rule is true. You must also set Filter as Top X and Number of candidates as 1. All the rules in a rule set are executed, and the queue with the highest total score is selected.

  For more information, see Manage Service Assignment Rules.

  > **Note:** Scoring applies only inside a rule set. But you might have scenarios where identical rules are present in different rule sets, and multiple rules from different rule sets match a work item. In such cases, the Assignment Manager randomly picks one of those identical rules.

Let's see a few examples of how you can make a rule unique:

Example 1 for Making a Rule Unique

Let's say you write the following rules:

- **Rule 1**: Variable A=1 and Variable B=2 (Action: Assign work item to Q1)

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- **Rule 2**: Variable A=1, Variable B=2, and Variable C=3 (Action: Assign work item to Q2)

Then the Variable A=1 and Variable B=2 part is common in both the rules. When an incoming work item satisfies Rule 2, it also satisfies Rule 1. And the Assignment Manager randomly picks one of the two.

To make these two rules unique, you can add a condition about variable C in Rule 1. For example, you can add the following condition to Rule 1: C isn't equal to 3.

Note: Rule 1 and Rule 2 are identical if you get a work item with all 3 variables and both rules are matching.

Example 2 for Making a Rule Unique

Let's consider the following example involving different rule sets. In Rule Set 1, you've a rule with the condition C1=A. In Rule Set 2, you've a rule with the condition C2=B. Here, C1 and C2 are different fields.

Now let's say you've a work item where C1=A and C2=B. These two rules aren't unique, and they both match the work item. In such a scenario, any one of the rules is randomly picked, and a queue is selected. But suppose you want the work item to be assigned only to a queue called Q1 because it has C1, and you want C2 to be ignored. Then you must make the rules unique by setting conditions such as the following:

- **Rule 1**: If C1 equals A and C2 isn't equal to B, then assign to Q1.
- **Rule 2**: If C1 equals A and C2 equals B, then assign to Q2.

Note: If the matching rules are in different rule sets, you can't apply scoring. If the matching rules were in the same rule set, scoring would help. For example: You set the scoring of Rule 1 to 10 and Rule 2 to 5.

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