Oracle Fusion Cloud Applications

Help Desk: Questions and Answers

Oracle Fusion Cloud Applications
Help Desk: Questions and Answers

F84747-21

Author: JKOLB

Contents

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 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!

1 Questions and Answers

What's a resource team?

A resource team is a group of resources formed to work on work objects. A resource team can comprise resource organizations, resources, or both. A resource team is neither hierarchically structured nor intended to implement an organization structure.

You can use resource teams as a quick reference to groups of related resources to which you can quickly assign work objects.

Note: You can either individually assign the members of a team to a task or assign entire teams to tasks.

How do I configure infolets for my users?

You can configure infolets that aggregate key information for a specific area, for example, personal profile.

Your users use infolets arranged in tabs in the Analytics section of the home page. Or, if it's a home page with a panel or banner layout, they use the page control icons.

If your users don't find infolet pages on the home page, you can enable them by using the Home Configuration tab in the Structure work area. Let's look at some tasks you can do to configure infolets.

- Create infolets.
- Add content to infolets. For example, you can add a task flow or a performance tile report, and if an infolet contains a performance tile report, then you can add a link to a detailed report in the same infolet.

  Note: In the context of infolets, a report is an analysis, not an Analytics Publisher report.
- Edit infolets. For example, edit infolet content and add, change, or remove link to detailed report.
- Delete infolets.

But before you start creating and editing infolets, here are a few things to keep in mind:

- You can add analyses from the catalog to an infolet, but not Analytics Publisher reports, or other objects like filters or prompts.
- To create or edit infolets, you must first either create and activate a sandbox, or activate an existing one. But make sure the sandbox has the Page Composer tool selected. If you want to make changes in a context layer that isn't the default layer, Site, you must create a separate sandbox just to use Page Composer in it. You can then change the context layer from Site to the other layer. For example, to create or edit infolets for a user with a specific job role, you must select the **Job Role** context layer.
- You can validate your changes in the sandbox in preview mode before you publish it.

Related Topics

- Configure Infolet Display
- Best Practices for Using Page Composer in Sandboxes

What's Import and Export Management?

Import and Export Management is used to import and export a wide range of application data using import and export management in your service application.

For example, you can use Import and Export management to export object data so that you can import it into another instance. You can also import records to the applications so that you don't have to create the records in the user interface. Only users with the or Help Desk administrator role can import and export objects.

Overview of Import Objects

You can import several objects into the application using the import management framework.

To import objects, Click **Tools > Import Management > Import Objects**.

The following is a sample list of top-level and sublevel objects that you can import into the service application. For more information on these and other objects available for import, see the Oracle Fusion Understanding Import and Export Management for Sales and Service guide.

- Help Desk Requests
    - Messages
    - Contact Members
    - Resource Members
    - References
- Queues
    - Queue Party Resources
    - Queue Team Resources
- Categories

> **Note:**
>
> - Since the request data depends on queues and categories, you must import the queues and categories before importing your help desk requests.

- Interactions: You can't import interactions into the application, but you can export the interactions for the help desk requests.
- Inbound email
- Inbound Message Filters: You can import the inbound message filters through Setup and Maintenance.

- Milestone Configuration: You can import and export milestone configurations only through Setup and Maintenance.
- Channels
    - Channel Resources
- Standard Text Folders: The import facility doesn't support importing hierarchical data directly. To import folders hierarchies, such as parent and child relationships, you must import the standard text folders data twice. The first time you import the file, the object data is added, and the second time you import the same file, the relationships are created.
- Standard Text Variables
- Standard Text
    - Standard Text Relations
- Self-Service Roles

Overview of Export Objects

You can extract large volumes of data from the application using bulk export. You can either extract a full set of records for an object, or perform incremental extracts. For example, you can extract the complete set of service requests data or extract an updated set of records every week.

To export objects, Click **Tools > Export Management > Export Objects**. For more information, see the Oracle Fusion Understanding Import and Export Management for Sales and Service guide.

How do I modify lookups for Help Desk requests?

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

A help desk 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 change the request lookups for **Internal Help Desk**:

Internal Help Desk Tasks

Task	Description
Manage Severities for Internal Help Desk Requests	Manage the values and color coding that indicate the severity of the issue to the employee for Internal Help Desk Requests.
Manage Status Values for Internal Help Desk Requests	Set up Status Values for Internal Help Desk Requests and map them to the required status type.
Manage Outcomes and Resolutions for Internal Help Desk Requests	Set up Outcomes and Resolutions for Internal Help Desk Request wrap-ups.

Task	Description
Manage Profile Options for Internal Help Desk Requests	Set up Profile Options for Internal Help Desk Requests.
Manage Categories for Internal Help Desk Requests	Set up the category hierarchy that describes the nature of the Internal Help Desk Requests submitted by the employee.

The following tasks are used to change the request lookups for **HR Help Desk**:

HR Help Desk Tasks

Task	Description
Manage Severities for HR Help Desk Requests	Manage the values and color coding that indicate the severity of the issue to the employee for HR Help Desk Requests.
Manage Status Values for HR Help Desk Requests	Set up status values for HR Help Desk Requests and map them to the required status type.
Manage Outcomes and Resolutions for HR Help Desk Requests	Set up Outcomes and Resolutions for HR Help Desk Requests wrap-ups.
Manage Profile Options for HR Help Desk Requests	Set up Profile Options for HR Help Desk Requests.
Manage Categories for HR Help Desk Requests	Set up the category hierarchy that describes the nature of the HR Help Desk Requests submitted by the employee.

The following tasks are shared between Help Desk (both HR and Internal Help Desk) and the Service offering (used by the CX solution). Important: See the Caution note in the following procedure.

Shared Tasks Between Help Desk (both HR and Internal Help Desk) and B2B Service

Task	Description
Manage Service Request Internal Priorities	Review and define lookup values that provide choices for a Service Request's Priority.
Manage Service Request Channel Types	Specifies the origin of the service request and the communication mechanism of each message.
Manage Service Request Sources	Specifies the source or user interface where the request was created.
Manage Service Request Resolutions	Specify the values identifying how the Service Request was ultimately resolved.
Manage Service Request Problem Types	Specifies the type of problem reported in the request.

To change lookups:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Help Desk
    - Functional Area: Help Desk Request
    - Task: Select All Tasks and click the task you want to change.

    > **CAUTION:** If the task doesn't specifically say Internal Help Desk or HR Help Desk, it's a shared task. Changes in tasks that are shared with the Service offering will impact the setup for existing service requests (used in CRM and the previous generation HR Help Desk). If your company is using the CRM Service application or the previous generation help desk, be sure to coordinate any changes to shared tasks with the Service Administrator.
2. In **Lookup Codes**, click the lookup code that you want to change.
3. Change the fields to correspond to your needs.
4. Click **Save and Close**.
5. Repeat the procedure for all the help desk request lookup tasks.

The help desk request lookup is changed.

How do I configure the media toolbar?

An administrator can configure both the horizontal toolbar and vertical media toolbar. Live Window is an alternative to the media toolbar. For more information about the live window, see the Configure Live Window and Companion Tab for CTI topic in the Related Topics list.

- If the company has enabled partner Computer Telephony Integration (CTI) service.
- When the signed-in user has the access privileges to a toolbar.

An administrator can configure multiple media toolbars, and specify a default.

The default toolbar gets assigned to all users.

> **Tip:** Set the toolbar with the greater number of users as the default toolbar.

An administrator can also set other users to the non-default toolbar, or alternatively the agents can do this themselves.

An administrator can set the alternative toolbar for users by using the SVC_OVERRIDE_PARTNER_TOOLBAR_SELECTION profile option and creating a user row with the alternative toolbar for each user.

Agents can set an alternative toolbar by doing the following:

1. Click the **Settings and Actions** menu, and select **Set Preferences**.
2. Click **Media Toolbar**, and then click the **Override Media Toolbar** drop-down list and select the alternative toolbar.
3. Click **Save and Close**, then sign out and log back in.

While configuring the toolbars, you can also configure incoming call notification window. The notification window displays basic details about the incoming call.

Related Topics

- What's Computer Telephony Integration (CTI)?
- How do I configure screen pop pages?

How do I create an inbound message filter?

To create an inbound message filter:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Help Desk
    - Functional Area: Email Communication Channel
    - Task: Manage Email Filters
2. On the **Inbound Message Filters** page, click **Create**.
3. On the **Create Message Filter** page, select a filter type. Filter type indicates the message part on which the filter is applied. A filter type can be one of the following:
    - File attachment: A filter is applied to the file type of an attachment.
    - Header: A filter is applied to a message header.
    - Mime attachment: A filter is applied to the mime type of an attachment.
    - Reply to: A filter is applied to the Reply To address.
    - Sender: A filter is applied to the sender of the message.
    - Subject: A filter is applied to the subject of the message.

    > **Note:** File attachment and Mime attachment filters prevent attachments from getting added to a help desk request or help desk request message. But they don't prevent the creation of the help desk request or help desk request message.
4. Specify a **Field Name**. The field name is required only for Header filters.
5. Specify an alphanumeric **Filter Pattern**. For examples, see "Examples of Inbound Message Filters".
6. Select an **Action on Pattern Match** to Accept or Reject.
7. Specify an optional **Description**.
8. Click **Create**.

> **Note:** All filters are enabled by default. To disable a filter, update the properties as described in "Update an Inbound Message Filter."

How do I view Help Desk analyses using OTBI?

Oracle Transactional Business Intelligence (OTBI) is a real time, self-service reporting solution bundled with your application. You can view analysis for the help desk on the Help Desk Dashboard which is accessed from the Help Desk Request list page.

OTBI provides prepackaged analytic content built on the Oracle Business Intelligence (BI) platform. These include subject areas for building your own dynamic analyses using an intuitive interface, industry standard metrics, and role-based, best practice reports and dashboards that deliver up-to-the-minute business insight across the entire extent of your service-related business operations.

Here's how you can view the analyses:

- To access BI Catalog, select **Navigator > Tools > Reports and Analytics**. The Reports and Analytics page is displayed.
    - Click the **Hierarchical Selector >>** icon and select **My Folders** or **Shared Folders** from the menu. Alternately, you can click the **Browse Catalog** button. The BI Catalog is displayed, where you can view your personal and shared analyses. You can also create your own analyses based on your business requirements using subject areas. You need to have the necessary privilege for authoring analyses.
- To access the Analytics page, from the Home page, click the Service group icon, and then click the Analytics icon. The Analytics page is displayed. You can search for the analyses available in BI Catalog, and mark your favorites. These favorites stay on the Analytics page as long as they remain favorites. This page also shows the analytics recently viewed by the signed in user.
- The Help Desk Dashboard is accessed from the Help Desk Request list page. Click the Dashboard icon.

How You Manage Service Infolets

For the prebuilt Service roles, the Service Infolets page displays the infolets based on the user's role. For administrator-defined roles, administrators must enable the Service Infolets page for each new role.

The procedures to create, manage, and enable Service infolets are the same as that for Sales infolets.

- For information about how to build analytics, see *Create and Edit Analyses Using a Wizard*.

Related Topics

- Where do I find resources for Oracle Fusion Service Analytics?

What are work assignments?

You use the assignment engine to assign resources (for example, service personnel or territory owners) to the business objects they must work on, such as a help desk request. Being assigned to business objects gives resources and their manager's visibility into the business object.

You also use rule-based assignment to assign additional resources to objects.

Candidate and Work Objects

When setting up assignments, you must be familiar with two types of assignment objects: candidate objects and work objects.

- Work objects are the business objects that are assigned, for example, help desk requests.
- Candidate objects are the possible pool of assignment candidates, for example, resources.

Rule-Based Assignment

Rule-based assignment lets you set up more rules that are used to assign resources to work objects. After you set up the rules containing the conditions that records must meet when resources match the rule conditions, they're assigned to the object.

For example, you use rules to assign a certain agent to a certain queue when the customer is in a specific state or region.

Rule-based assignment requires that you plan your rules, create the rules using the rules UI, and set profile options to configure the assignment behavior, in addition to any scheduled processes that must be run.

Assignment Profile Options

Each of the business objects available in assignment has its own set of profile options that enable you to further configure the application behavior.

Scheduled Processes

Scheduled processes are batch jobs that capture data and let business objects to act on that data. You must schedule several processes when using assignment. See the *Service Request Queue Assignment* topic in the Oracle Fusion Cloud Sales Understanding Scheduled Processes guide.

Assignment Reports

You use the Diagnostic Dashboard to generate reports about the assigned objects and the volume of territory data involved in assignment.

Assignment Resources

To learn more about assignment, see the following resources:

- Online help: Use the keyword **assignment** to search for the relevant topics.
- Assignment Resource Center: See the Assignment Manager Resource Center page on My Oracle Support (Doc ID 1522958.1) for more resources.

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. Also, If you enable Omnichannel, it's enabled for both Fusion Service and Help Desk.

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: Help Desk
- Functional Area: Assignment and Routing
- 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 employees 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 employees. 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 HR Help Desk, use the email ID that contains the text 'intservice' 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 Help Desk application from the help desk request. For example, when an agent responds to the primary employee 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 an employee:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Help Desk

- Functional Area: Other Communication Channels
- Task: Manage Communication Channels

2. In the **Service Channels** page, click **Create Channel**.
3. In the **Create Channel** window:
   a. Select a **Stripe Code**.
   b. Select the **Channel Type** as **Email**.
   c. 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.
   d. 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.
   e. (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.
   f. When a new channel is being created, it's active by default. To deactivate it, clear the **Active** option.
   g. (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.
   h. Click **Save**.

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

You can set options for incoming and outgoing emails by configuring email profile options. For example: You can set the Reply To email ID that's used to send out a receipt to the employee who sends a message.

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 employees must be processed automatically by creating or updating an help desk request. If this option is disabled, only the inbound message object is created, without creating a request.
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.

Inbound Profile Options	Description
	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 help desk request 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. 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 a help desk request must be created for emails sent by unknown employees.
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.

Inbound Profile Options	Description
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. **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 a help desk request in both the request header and the request message. The default value is No.
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 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.

Inbound Profile Options	Description
	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 HR Help Desk and Internal Help Desk 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 employees. 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 help desk requests. 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

Outbound Profile Options	Description
	by your employee, 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 an employee, 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.

Configure the outbound profile options for HR Help Desk, 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. 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_HRD	Indicates the email template for the Help Desk Service Request Forward messages.
SVC_SR_RESPONSE_TEMPLATE_NAME_HRD	Indicates the email template for Help Desk Service Request Response messages.
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_SR_SYSTEM_RESPONSE_TEMPLATE_NAME_HRD	Indicates the email template for Help Desk Service Request System Response messages.
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.

To configure email profile options:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Help Desk
    - Functional Area: Email Communication Channel
    - 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 assign work to agents?

Work assignment refers to interactions or work items such as help desk requests 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.

> **Note:** In automatic queues, the priority of a request is calculated based on severity and wait time. Help desk requests with highest severity are assigned first. If there are multiple requests with the same severity, those requests that have been in the queue for the longest time are assigned first. But this rule applies only to bigger volumes of requests and many agents and not on a small scale.

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
- 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 a help desk request can be assigned to an agent:

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

Help Desk supports channel capacity for non real-time work. Active non real-time interactions are decided by the qualifying statuses. Any interaction that's in one of the specified qualifying statuses is considered to be an active interaction.

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.

To set channel capacity:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Help Desk
    - Functional Area: Assignment and Routing
    - Task: Manage Capacities
2. To provide queue owners and 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. 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.

How do I enable Smart Text for Help Desk?

Productivity tools such as Smart Text are features you can add to help desk request create or edit pages. 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.

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

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

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

1. Navigate to Setup and Maintenance.
2. Click the **Tasks** icon.
3. Click the **Search** link.
4. Enter Manage Administrator Profile Values in the **Search** field.
5. Click **Search**.
6. Click the **Manage Administrator Profile Values** link.
7. Enter the profile option code you want to set.
8. Click **Search**.
9. In the **Profile Values** section, for the profile option code, select Yes in the **Profile Value** drop-down list.
10. Click **Save and Close**.
11. Click **Done**.

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

Update the Status List Order

The status list on the Summary Details page shows a list of statuses that can be associated with a help desk 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: Help Desk
    - Functional Area: Help Desk Request
    - Task: Manage Service Request Status Values for Internal Help Desk Requests or Manage Status Values for HR Help Desk Requests
2. Update the **Ranking** column to position the status in the status list according to your requirements.
3. Click **Save and Close**.

Can I add a logo to help desk outbound emails?

A predefined subtemplate has common components for all workflow notifications based on predefined report layouts. You can edit these shared components so that the same changes apply to your notifications.

Here are some of the shared components in the subtemplate:

- Branding logo, if you add one to the subtemplate, which would appear as the first component in the email body. The logo appears in email notifications only.
- Action buttons in email notifications.

- Links at the end of the email notification, one to the corresponding transaction page, and another to the in-app notification.

For example, you can add a branding logo in the designated place in the subtemplate, or change the text on the buttons and links.

Note:

- When you make a copy of a predefined layout template to edit, the copy automatically inherits the same predefined subtemplate.
- Other than this central subtemplate for all notifications, you might also find predefined subtemplates specific to a product family. We talk about the central one here, but you would generally follow the same steps for other subtemplates.
- You must edit a copy of the subtemplate in the Custom folder of the BI catalog. Don't directly update the predefined subtemplate, including renaming it.
- When you work on your copy of the subtemplate, add your own content or edit what's already there, but don't remove anything.
- The exact steps can vary depending on your version of Microsoft Word.

Modify Shared Components in the Subtemplate

Here's how you edit a copy of the predefined subtemplate that has the shared components:

1. Click **Navigator** > **Tools** > **Reports and Analytics**.
2. Click the **Browse Catalog** icon.
3. In the catalog (the Folders pane), expand **Shared Folders** > **Common Content** > **Templates**.
4. For **Workflow Notification Subtemplate**, click **More** and select **Customize**.
   If you're not using the Customize option, even though it's recommended:
   a. Click **Copy** in the toolbar with Workflow Notification Subtemplate selected.
   b. In the catalog, expand **Shared Folders** > **Custom** > **Common Content** > **Templates**. Create a Templates folder in this location if it doesn't exist.
   c. Click **Paste** in the toolbar.
5. In the catalog, with the Templates folder open under the Custom folder, click **More** for the subtemplate and select **Rename** to give it a new name.
6. Click the **Edit** link for the renamed subtemplate.
7. In the Templates section, click the link in the Locale column.
8. Save the subtemplate .rtf file to your computer.
9. Open the .rtf file with Microsoft Word.
   - To add a logo, insert your own image in the subtemplate.

- To change button or link text, edit the text accordingly. Make the same edits wherever that button or link text appears in the subtemplate.

  > **CAUTION:** To make sure that your layout templates reflect these changes without more rework, don't edit any other text in the subtemplate .rtf file.

10. Update Word options so that existing links remain intact in the subtemplate.
    a. Click **File** > **Options** > **Advanced**.
    b. In the Word Options dialog box, click **Web Options** in the General section.
    c. In the Web Options dialog box, open the Files tab.
    d. Deselect the **Update links on save** check box.
11. Save your changes in Word.

Upload the Modified Subtemplate

Now you upload your subtemplate to the BI catalog:

1. In the catalog, expand **Shared Folders** > **Custom** > **Common Content** > **Templates**.
2. Click **Edit** for your subtemplate.
3. In the Templates section, click the **Upload** icon.
4. Select your modified .rtf subtemplate and a locale, and click **OK** to replace the original subtemplate.

Point Layout Templates to Your Subtemplate

Update all the report layout templates that you want to apply your subtemplate to:

1. In Microsoft Word, open the .rtf file for the layout template, as you would to make any other changes to the notification.
2. At the beginning of the document, change the subtemplate reference. For example, change `<?import:xdoxsl:///Common Content/Templates/Workflow Notification Subtemplate.xsb?>` to `<?import:xdoxsl:///Custom/Common Content/Templates/My Workflow Notification Subtemplate.xsb?>`.
3. Save your work.
4. Test things out to make sure you see your subtemplate changes in the notification output.

Related Topics

- What is a subtemplate?
- Customize Pixel-Perfect Reports

How do I define email templates?

You can create email templates for the Forward, Response, and System Response messages of a help desk request.

You can create templates using HTML to send email notifications for help desk requests 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 **Help Desk 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 help desk request 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 help desk request 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 an employee from the Messages tab in help desk request, the email thread is displayed.
14. In email templates that are meant for forwarding to internal users, you can include a link to the request 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 help desk request is created, it might be with or without a queue. So it's possible that an email notification is sent before the request 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.

How do I configure the presence and availability privilege?

To set the presence and availability, an agent must be given the Manage Omnichannel Presence and Availability privilege.

This privilege is available by default to the following job roles:

- Next Gen Human Resource Help Desk Agent
- Next Gen Human Resource Help Desk Manager
- Internal Service Request Help Desk Agent
- Internal Service Request Help Desk Manager

To grant the **Manage Omnichannel Presence and Availability** privilege to any other role, do one of the following in the **Security Console**:

- Create a role and provide the privilege to the role.

- Copy one of the default job roles with the privilege and create a role to add the privilege.

For more information about copying job roles, see the *Oracle Fusion Cloud Customer Experience Securing Sales and Fusion Service* guide.

Note: After you add the privilege to the new role, you must associate a user to the new role.

Configure the Presence Toolbar

In addition, for the Presence toolbar to be visible for Help Desk in the Redwood Experience, the Profile Option with the name SVC_HD_SHOW_AVAILABILITY is required.

There are two steps to configure this:

1. Create a new profile option to enable the latest version and set the value to 'Y'.
2. Add the new profile option to the profile categories so it is available for REST queries.

Create a New Profile Option

1. Navigate to Setup and Maintenance.
2. Click **Tasks**.
3. Search for the task Manage Profile Options.
4. Click **Search**.
5. Click the Manage Profile Options task link.
6. On the Manage Profile Options page, in the Search Results region click **Add** .
7. On the Create Profile Option page, enter the following:
    - Profile Option Code: SVC_HD_SHOW_AVAILABILITY
    - Profile Display Name: Help Desk Show Availability
    - Application: Service
    - Module: Service
    - Description: Enables Help Desk agent to set availability.
    - Start Date: 12-Dec-2022
    - End Date: blank
8. Click **Save and Close**.
9. On the Manage Profile Options page, select the **Enabled** and **Updatable** checkboxes for the Site level.
10. Click **Save and Close**.
11. Click **Done**.

Set the Profile Option Value on the Newly Created Profile Option

1. Navigate to Setup and Maintenance.
2. Click **Tasks**.
3. Search for the Manage Administrator Profile Values task.
4. Click **Search**.
5. Click the link for the Manage Administrator Profile Values task.
6. On the Manage Administrator Profile Values page,enter the Profile Option Code: SVC_HD_SHOW_AVAILABILITY
7. Click **Search**.
8. In the Profile Values region, set the Profile Value for Site to **Y**.
9. Click **Save and Close**.
10. Click **Done**.

Note: It can take a few minutes for the new Profile Option to take effect. You can verify you're seeing the new UI version by the URL patch. The new version contains 'fscmUI/redwood/helpdesk'. If the URL contains 'crmUI/helpdesk' then the previous version is still enabled.

Related Topics

- Copy and Edit Duty Roles

Is reporting and analytics available in Help Desk?

Reporting and Analytics are features native to Oracle Fusion Cloud Sales can be used with Help Desk.

Note: Help Desk infolets are available for Agents and Managers. If the infolets are required for the Help Desk administrator role, add these privileges.

- SVC_VIEW_HR_HELPDESK_AGENT_DASHBOARD_PRIV
- SVC_VIEW_HR_HELPDESK_MANAGER_DASHBOARD_PRIV

Note: If you are not using Fusion Sales and Fusion Service, you must complete the following tasks to see and drill down from OOTB infolets:

- Calendar
- Org Hierarchy
- Enable SR Audit

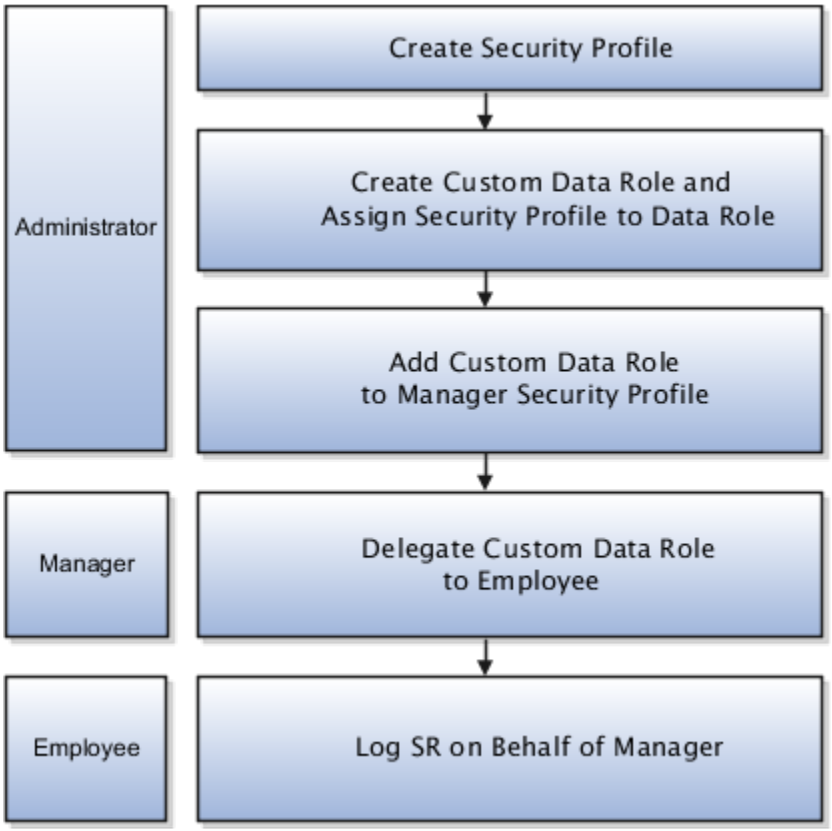
How do I set up a delegation for users to create Help Desk requests on behalf of others?

Predefined roles enable managers to log Help Desk requests for anyone in their employee hierarchy. Employees normally can only log requests for themselves. But, managers can delegate their role to anyone in their employee hierarchy to let them log requests on their behalf.

For example, if a manager goes on vacation and wants to give access to an employee to logging requests on their behalf while they're away, they can delegate their role to that employee. The delegated person can use the employee picker on the request to select another employee in the manager's hierarchy as the primary point of contact.

The remainder of this topic details the tasks an administrator must complete to enable the delegate role, how a manager delegates the role, and what an employee must do to log a request on behalf of their manager.

The following figure shows the flow of tasks that are required when you set up the delegation of users.



Create a Security Profile

To create a security profile:

1. Sign in as an administrator.
2. Navigate to **Setup and Maintenance**.
3. Search for and select the **Manage Person Security Profile** task.
4. Click **Create**.
5. On the **Create Person Security Profile** page, enter a **Name** for the security profile. For example, enter Delegate Security Profile.
6. Select **Enabled**.
7. In the **Manager Hierarchy** region, select **Secure by Manager Hierarchy**.
8. Select **Both** from the **Hierarchy Content** choice list.
9. Click **Save and Close**.
10. Click **Done**.

Create a Custom Data Role and Assign Security Profile

Now, you must create a custom data (or delegate) role and assign the security profile to the data role.

1. Sign in as an administrator.
2. Go to **Setup and Maintenance**.
3. Search for and select the **Manage Data Role and Security Profiles** task.
4. Click **Create**.
5. On the **Create Data Role: Select Role** page, enter a name for the **Data Role**. For example, Delegate Role.
6. Search for the job role **Human Resources Analyst**.

7. Select **Human Resources Analyst** from the search results.
8. Click **OK**.
9. Select **Delegation Allowed**.
10. Click **Next**.
11. In each of the following regions select the indicated value from the choice list:
    - **Organization Security Profile Value** - View All Organizations
    - **Position** - View All Positions
    - **Legislative Data Group** - View All Legislative Data Groups
    - **Document Type** - View All Document Types
    - **Payroll** - View All Flows
12. In the **Person** region, select the new security profile you just created. For example, Delegate Security Profile.
13. In the **Public Person** region, select the new security profile you just created For example, Delegate Security Profile.
14. Click **Next** through the remaining train stops.
15. Click **Submit** on the **Create Data Role: Review** page.

Add Custom Data Role to Security Profile

Now, add the custom data role to the manager's security profile.

Delegate Custom Role to Employee

The manager now can delegate the custom role to an employee in their hierarchy.

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

The designated employee can now log a service request on behalf of the manager. When logging the service request, the employee selects anyone in the manager's hierarchy as the Primary Point of Contact on the service request.

Related Topics

How do I manage action plan actions for Help Desk?

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

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

- Offering: Help Desk

- Functional Area: Action Plan
- Task: Manage Action Plan Actions

Create a New Action

Here's how to create a new action:

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

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

   Depending on the Help Desk features you're using, Action types can include:

   - Appointment
   - Article

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

   - Case
   - Dynamic Process
   - HR Help Desk Request
   - Internal Service Request
   - Task

   Follow the next four steps if you're creating a Dynamic Process Action (with the Run Processes Through Action Plans feature). If you aren't using this feature, you can skip the next four steps.
6. Click the **Edit** icon in the **Process Name** field.
7. Search for and select the process you want to add to the action.

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

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

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

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

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

10. Select the **Action Visibility**.

    Visibility options include:

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

11. Enter a context for the action.

    Context options include:

    - Internal Help Desk Request
    - HR Help Desk Request
    - Case

12. Enter a numeric value for the **Duration** of how long the task should take. Select a unit of measure for the numeric value (days, hours, or minutes).
13. Select a **Stripe Code** (**HR Help Desk Request** stripe, or **Internal Service Request** stripe)from the drop-down list.

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

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

- Cases
- Service Requests
- Help Desk Requests
- Internal Service Requests

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

Attribute Mapping Tab

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

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

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

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

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

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

Here's how you add an attribute mapping:

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

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

Status Mapping Tab

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

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

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

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

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

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

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

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

   Status options include:

   - Blocked
   - Completed
   - In progress

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

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

   Operators include:

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

6. Select a value for the status.

Example of a Status Mapping

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

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

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

Dependencies Tab

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

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

Action Errors Tab

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

This tab isn't used for Dynamic Process actions.

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

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

Edit an Existing Action

To edit an existing action:

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

How do I 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**.

How are business units for set up for Service and Help Desk?

With business units (BUs), you can deploy more than one service center within a single instance of your service or help desk application. This topic gives an overview of the steps that you must perform to complete the business units setup.

You can use multiple BUs in the following ways:

- Segment SRs between BUs so that users can search and identify SRs from multiple BUs.
- Use product catalogs, categories, channels, and email templates specific to a BU.
- Assign SRs to queues by writing rules based on BU.
- Create service request BI reports specific to a BU.

Currently, the following objects aren't supported by multiple BUs in Service: accounts and contacts, users, resources, and lookups.

To set up business units in Service, you must perform the following tasks in the given order.

Step	Description
Setting Up Business Units for Service	Add the Manage Business Unit functional area to the Service offering by using the **Change Feature Opt In** link in Setup and Maintenance.
Manage Common Profile Options	Set the profile options to enable the multiple-BU functionality in the Manage Common CRM Business Unit Profile Options task.
Manage Internal Resource Organizations	Define internal resource organizations to be associated with the BU.
Manage Resource Organization Hierarchies	Add the internal resource organizations to the internal resource organization hierarchy.
Create Business Unit	Create a BU to be associated with the resource organization in the Manage Business Unit Task.
Associate Resource Organization to Business Unit	Associate the internal resource organization to the BU you created. Use the Resource Directory.
Create Employees	Add users to the organization in the Users, Roles and Delegations task, and make one of the resources a manager for the organization.
Reset Passwords for Users	Reset the password for the users.
Set the Scope in Service Setup Tasks and complete Service Setup tasks.	Set the scope for Service tasks and set up the remainder of the Service offering.

Step	Description
Add additional BU fields in the SR if users are associated with multiple BUs.	Change the layouts of the SR pages if required. Use Application Composer to include multiple BU fields in the SRs. **Note:** Only required if a user is associated with multiple business units.
Configure Multiple Business Units with Digital Customer Service	If you implement multiple business units for Digital Customer Service, you must complete some additional configuration.

How do I enable multiple business units for Help Desk?

To enable multiple business units (BUs) for Help Desk, 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**.

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**.

How do I set up request visibility based on queue?

When users view lists of requestsor create user-defined searches, access is based on the cumulative set of data security policies assigned to all the roles associated with them. You can restrict access based on their queue membership.

Restricting access ensures users see only the requests that are in their queue by completing the following processes in the Security Console:

- "Remove Data Security Policies from Users": If the users have been assigned other data security policies that grant them access to a larger set of requests , then you must remove such data security policies from the users.

- "Assign Data Security Policies Based on Queue": Grant queue-based visibility to requests for specific roles. This ensures that users with these specific roles can see only the assigned to the queues where they're a resource member.

How do I change acknowledgment messages for inbound email?

When you receive an email from an employee to open a help desk 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 Help Desk, the following predefined messages are provided:

- SVC_EMAIL_ACK_FOR_KNOWN_EMP
- SVC_EMAIL_ACK_FOR_MULTI_EMP
- SVC_EMAIL_ACK_FOR_UNKNOWN_EMP

To change the acknowledgment messages that you send out to 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.

How do I set notification preferences?

The Notification Preferences page enables administrators to configure the notification rules. Users who have the ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION or ORA_SVC_HR_SR_ADMINISTRATIONduty 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 **Internal Help Desk Request** or **HR Help Desk Request** .

   > **Note:** Other supported objects are also displayed in the **Object** drop-down list. For Classic Help Desk, use the Service Request object.

   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 help desk request object:

Recipients for Help Desk Request Object	Delivery Options for Help Desk Request Object
- **Assigned To**: Resource to whom the help desk request is assigned. - **Manager of Assigned To**: Manager of the resource to whom the help desk request is assigned. - **Resource Team**: Extra resources that have been added to a help desk request on the Team subtab. If you've a team of resources collaborating on a help desk request, and a trigger such as the help desk request escalating to Critical status happens, the entire team can be informed. - **Queue Owner**: Owner of the queue. If your organization uses manual assignment, the queue owner can be notified when a new help desk 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	- **Bell Notifications**: Sends a bell notification to the web application. - **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.

Recipients for Help Desk Request Object	Delivery Options for Help Desk Request Object
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. - **PrimaryContactPartyID**Note: For Help Desk in the Redwood Experience only. If the use case is to send notification to PrimaryContactPartyID in classic Help Desk, then only Groovy should be used without using Notification Preferences.	

h. To let users follow a specific help desk request and receive all notifications for that help desk 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 Help Desk Request Details page.

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

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

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

- Internal Service Request Administration
- Internal Service Request Analysis
- Internal Service Request Management
- HR Service Request Administration
- HR Service Request Analysis
- HR Service Request Management

> **Note:** To evaluate whether a resource is still valid and enabled to follow specific help desk requests, run the **Purge Obsolete Notification Followers** scheduled process. This scheduled process removes inactive and end-dated users from following the help desk 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**.

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** > **Internal Service Request or HR Help Desk Request** > **Server Scripts** . The **Server Scripts** 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 a help desk request.

   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 in Help Desk?

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 help desk request has been assigned to an agent.
   For more information about defining notification triggers, see the "Define Notification Triggers" section.
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 agents and employees, to notify them about an event on the help desk 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 help desk requests:

1. Sign in to the application as a setup or administrator user.
2. Navigate to **Setup and Maintenance**.
3. Select the **Help Desk** 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 help desk requests.
6. Click the **Edit** icon in the **Features** column of the **Productivity Tools** row.
7. Enable your required notification delivery channels:
   - 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**.

Can I configure the prefix for Help Desk requests?

When a help desk request 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 help desk requests:

1. Sign in to the application as a setup user or administrator.
2. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Productivity Tools
   - Task: Manage Public Unique Identifier Sequence Generation
3. On the Manage Public Unique Identifier Sequence Generation page, for the Help Desk Request or Internal Service Request **Object Name**, specify a prefix of your choice in the **Prefix** column. For example: HRHD- or ISR-.
4. Click in the **Radix** column for the HR Help Desk Request or Internal Service Request object.
5. From the multiple options displayed in the drop-down list, select the type of radix that you want for your help desk requests .

   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 "Help Desk Profile Options" topic.
6. Click **Save and Close**.

How do I change email templates to display the email thread?

When an employee replies to an email from the Messages tab in an help desk request, it's good to display the email thread. This way, the recipient clearly understands the context.

For this to happen, you must insert the #PastConversation# tag into the email templates for help desk requests. This tag indicates the place within the email layout where you want to insert the previous messages from the email thread.

When the #PastConversation# tag is detected, the email-sending process automatically inserts the following details of previous messages from the request:

- Type of message
- Sender
- To/Cc
- Received date and time of the message for customer entries
- Sent date and time of the message for agent responses
- Creation date and time for other messages
- Message content

When employees preview an email, the email thread is included in the preview. This helps them to verify the flow and make changes as required, so the message is clearly understood.

To change an email template to display the email thread:

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. Click **Email Templates** from the Common Setup region or the Overview page.
5. From the **Object** drop-down list in the Email Templates page, select **Help Desk Request** .
6. From the **Active** drop-down list, select **Yes**.
7. Click **Search**.
8. From the list of templates displayed, select the template that you want to change.
9. Click **Edit**.
10. Navigate to the Email Body region of the email template.
11. Insert the #PastConversation# tag at the place within the email body where you want the email thread to be displayed.
12. Click **Save and Close**.

Related Topics

- How do I display email thread of past conversations?
- How do I configure profile options to display an email thread?
- How do I define email templates?

How do I display email thread of past conversations?

When an employee receives a response to an email from the Messages tab in a help desk request, it's a good idea to display the email thread with the past conversations. This way, the employee easily understands the context.

This is also useful as the email thread is included when the email is previewed. Past conversations can be viewed in the thread latest replies can be written as required.

To enable the display of the email thread, you need to complete a few simple processes:

- Configure a few profile options

- Change email templates to display the email thread

Related Topics

- How do I configure profile options to display an email thread?
- How do I change email templates to display the email thread?
- How do I define email templates?

How do I configure profile options to display an email thread?

When an employee responds to an 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:

Profile Option	Description
	• SVC_EMAIL_PAST_CONVERSATION_START_MARKER: [##Send your response as a reply to the above mail##] • 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**.

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 a help desk request.

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.

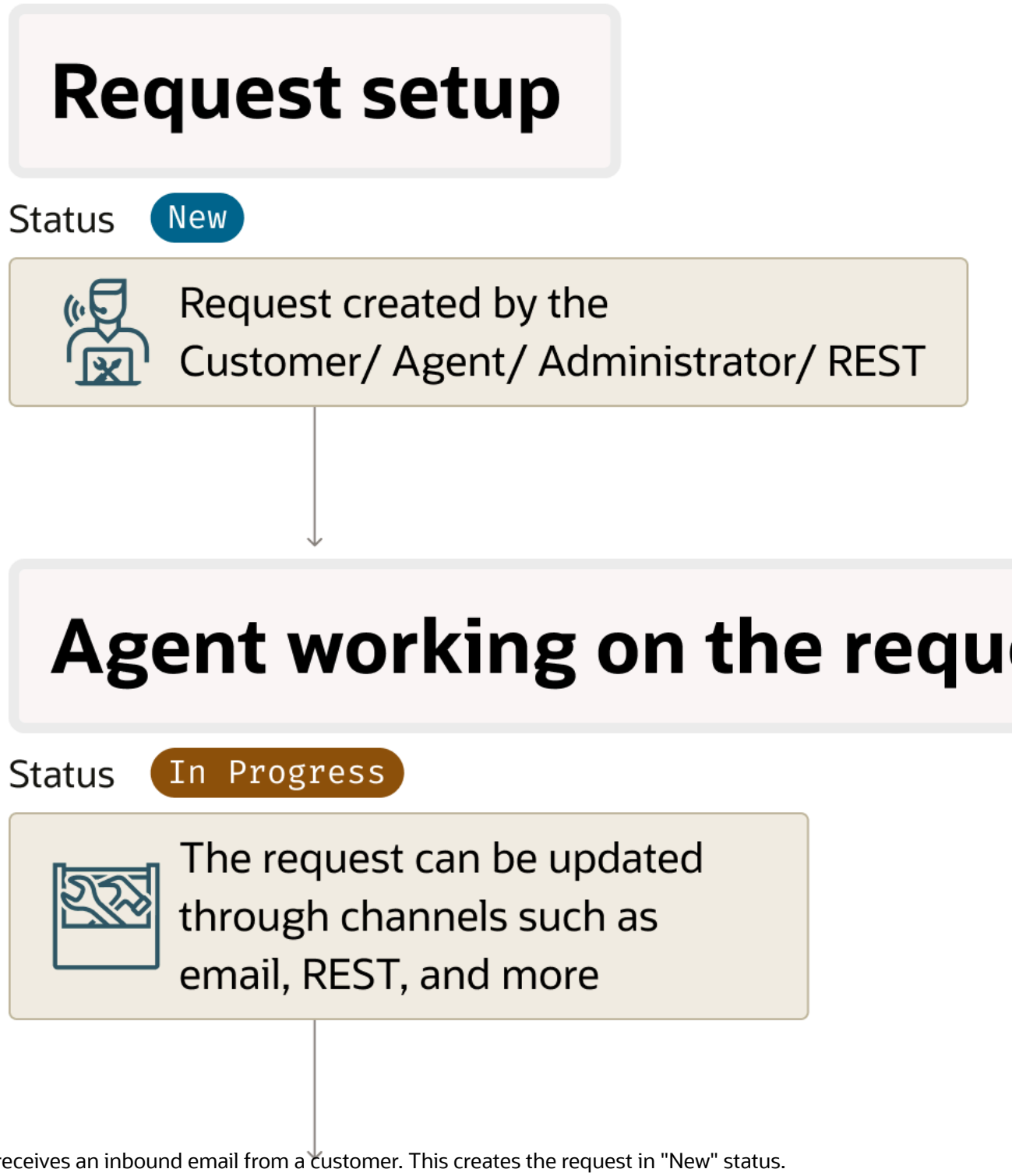
> **Note:**
> - The lookup codes ORA_SVC_CHAT_TRANSCRIPT and ORA_SVC_WRAP_UP aren't applicable to emails.
> - If you disable any of the following lookup codes, the corresponding message types disappear from the Compose menu on the Messages sub tab of a help desk request: ORA_SVC_INTERNAL_NOTE, ORA_SVC_RESPONSE, ORA_SVC_CUSTOMER_ENTRY, and ORA_SVC_FORWARD.

What's the life cycle of a help desk request?

Here's an overview of the stages in a help desk request life cycle.

Typical Flow of the Help Desk Request Process

The following graphic depicts the typical flow of a help desk request



- The agent receives an inbound email from a customer. This creates the request in "New" status.

Use any of the following methods to create a help desk request:

- Customer sends email to create the request. This requires setup by an administrator.
- Customer creates the request using Digital Customer Service. This requires setup by an administrator.
- Agent manually creates the request by clicking the **Create** button.
- Use other methods such as REST or Import.

- The agent starts working on the request, and changes the status to "In Progress."

  Use any of the following methods to update the request:

  - Customer sends email to update the request.
  - Customer updates the request using Digital Customer Service.
  - Agent manually updates the request.
  - 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 request 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 request status to Resolved.

  Use any of the following methods to resolve the request:

  - Automatic Resolve of the request from Waiting status. This requires setup by an administrator.
  - Customer resolves the request using Digital Customer Service.
  - Agent manually updates the request.
  - Use other methods such as REST or Import.

- Resolved requests are automatically closed through an Enterprise Scheduler (ESS) job after a the number of days that your administrator defines when the application is configured.

Why assign an owner to a queue?

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

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

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

You must complete the following processes:

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

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

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

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

What's a Coverage Schedule and how does it work?

A coverage schedule is a service calendar containing detailed time intervals that identify when a help desk request is expected to be worked.

Coverage schedules provide flexibility to define business hours and specific intervals during the year when different operating hours are offered. For example, you can define a specific interval such as a particular week or seasonal time period where you might extend service hours on specific days. You can also treat holidays or exceptions more specifically, such as offering shortened hours on some holidays, instead of a full day inclusion or exclusion.

To identify the due date and time for a milestone, time outside the specified intervals is skipped. For example, if your coverage schedule interval is 9:00 a.m. to 5:00 p.m. Monday through Friday, a milestone that started Friday at 4:00 p.m., which is due in 120 minutes, would be due 10:00 a.m. on Monday.

Coverage schedules can also contain holidays, nonworking times, or extended working hours, which identify days to be skipped or hours to be added when deciding the due date. You must configure the coverage schedule exceptions before you create or change a coverage schedule. In the previous example, when a milestone started 4:00 pm Friday and had 120 minutes until due, if Monday was identified as a holiday, the milestone would be due at 10:00 am on Tuesday instead.

Here's how the application calculates the **Due Date** and **Time Remaining** fields that are displayed on the Service Request Milestone Details page:

- **Due Date**: The due date for a milestone is calculated using the schedule that's associated with the applicable entitlement or coverage rule. The schedule defines whether there are any hours of the day or week when the clock isn't running for the organization, such as evenings, holidays, lunch breaks, and so on.

  When a service request is updated, the application looks at the coverage rules and the associated schedule, calculates the date and time the milestone expires, and assigns the milestone to the service request. The milestone due date is calculated based on the time the milestone starts, which might not be the same as the

time the service request was created. The application displays this due date for that milestone on the Service Request Milestone Details page.

If the SR attributes change so that the milestone goes into a paused state, the clock stops running. The application captures the time spent on the milestone up until the milestone was paused, for future use. The due date for the milestone is no longer displayed, because it can't be determined until the milestone resumes the countdown. After the pause is lifted and the countdown resumes, the application recalculates the milestone due date. The recalculation is based on the original time you specified for that milestone when the help desk request was created, minus the cumulative time spent by the agent up to that point.

- **Time Remaining**: The **Time Remaining** field displays its value depending on whether the milestone is actively counting, paused, or overdue. The application doesn't show time remaining for milestones that are complete or canceled.

  When the milestone is actively counting down, the exact due date is known. The **Time Remaining** field shows an approximation of the amount of time between the due date and the current time. This approximation is expressed in the largest indivisible unit of time and rounded down. For example, if the current time is 3:00 PM and the milestone is due at 4:05 PM, the time remaining shows 1 hour. If the current time is 10:00 AM and the milestone is due the next day at 11:00 PM, the time remaining shows 1 day.

  When the milestone is paused and the due date can't be determined, the **Time Remaining** field identifies only the time left in the milestone. The time left is determined by calculating the total time specified in the coverage, minus the time spent so far. For example, a milestone that was set for 24 hours (based on the coverage rules), and that was active for 10.5 hours before it paused, will have 13.5 hours remaining for the duration of the time it's paused. The **Time Remaining** field uses the same approximation method as described for active milestones, so 13.5 hours is rounded down to show 13 hours. Again, the actual due date isn't in 13 hours, because it's unknown when the counting will resume and therefore how the schedule might affect the due date. The 13 hours is given as an approximation of the working time you'll have once the milestone restarts.

  When the milestone is overdue but still not complete, the Time Remaining field shows how much time has elapsed since the milestone expired. The profile option ORA_SVC_SLA_INCLUDE_PAUSED_MINS_IN_TIMEREMAINING indicates whether this calculation considers paused minutes in the calculation.

  Excluding paused minutes ignores whether the milestone has paused after expiration, and results in a more exact calculation of actual time elapsed and improved performance. Including paused minutes considers how much time was spent in the paused state after expiration and reduces the overdue time remaining value by that amount. This requires more calculations, is less consistent with the calculation before expiration, and can impact performance.

  > **Note:** Oracle recommends setting this profile option to N and starting with release 23D, all implementations will have the value set to N. You can then change the value to Y if you want for backward compatibility.

A schedule named **24 by 7** is preconfigured for all implementations. This schedule doesn't specify holidays or downtime, so the due date for a milestone that uses this schedule, is calculated without skipping any time.

Related Topics

- How do I set up milestones and coverages?
- How do I create a coverage schedule?
- How do I create default coverages?
- How do I create standard coverages?

How do I set up more condition columns for standard coverage entitlement rules?

The application has a default entitlement type called Subscription Entitlements (or Contracts Service Entitlements), which is a matrix class, and a corresponding service mapping that you select when you create your standard coverage.

This default matrix class defines the structure of the entitlement rules for the standard coverage, including the condition columns (**Severity** and **Channel Type**), and result columns (**Calendar**, and milestone values and warning thresholds). Condition columns in the coverage are compared to field values in a help desk request to determine which line is applicable, and the result columns display the schedule, milestones, and thresholds that are applied.

You can use other columns from the help desk request as condition columns in coverages, by editing the service mapping and creating your own matrix class. To do this, first modify the service mapping to add the intended attribute. After you modify the service mapping, create a matrix class including the attributes, and then select the matrix class as the entitlement type for a standard coverage.

How do I set up a milestone based on a field I created?

The default entitlement type Subscription Entitlements (or Contracts Service Entitlements), is a matrix class. A corresponding mapping is selected when you create your standard coverage. Here's how you create a matrix class and add more conditional columns.

This default matrix class defines the structure of the entitlement rules for the standard coverage, including the condition columns (Severity and Channel Type), and result columns (Calendar, and milestone values and warning thresholds). Condition columns in the coverage are compared to field values in a help desk request to determine which line is applicable, and the result columns display the schedule, milestones, and thresholds that are applied.

You can use other columns from the help desk request as condition columns in coverages, by editing the service mapping and creating your own matrix class. To do this, first modify the service mapping to add the intended attribute. After you modify the service mapping, create a matrix class including the attributes, and then select the matrix class as the entitlement type for a standard coverage.

1. On the Subscription Configuration page, click **Dynamic Matrix Configuration > Manage Matrix Classes**.

   The Manage Matrix Classes page is displayed.

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

2. Duplicate the **HR Service Request Subscription Entitlements or Internal Service Request Subscription Entitlements** (or **Contracts Service Entitlements**) matrix class. You can also edit a matrix class you created before, or create a new matrix class.
3. On the Edit Matrix Class page for the selected matrix class, in the **Condition Columns** section, click **Add Row** to add a new condition column for the mapping that you created in the previous service mapping procedure. This condition column displays in the entitlement rules along with the default columns.
4. Enter the **Name** of the column and the **Source Code Name**.

5. In the **Compare to Attribute** column, select the attribute that you created in the previous service mapping procedure.
6. In the **Domain** column, click **Edit Domain** and select a domain value corresponding to the attribute you're mapping.
7. To allow null values to be specified in the coverage for this column, select the **Allow Null** checkbox, and optionally, select the **Null is Wildcard** checkbox.

   Then select the appropriate value for the **Null is Wildcard** option, based on the intended behavior described in the following table. The **Severity** condition column is used as an example in the following table.

Allow Null Selected?	Null is Wildcard Selected?	Add a Coverage Row with Blank Value?	Coverage Rows Applied on SR with Blank Value Specified?	Coverage Rows Applied on SR with Non Blank Value Specified?
N	N	Not possible	No rows applied	When explicit match between help desk request and coverage row.
Y	Y	Y	Blank row applied	○ If the help desk request severity isn't defined in a row, the blank coverage row is applied. ○ If the help desk request severity is defined in a coverage row, an error occurs and no values are applied. Both the blank row and the matching row are considered a match, but coverages must be set up so that only one row from a specific coverage can ever be matched. If two rows match, it results in an error condition and no rows being applied. For more information, see the step 5b in the topic "Create Standard Coverages".
Y	Y	N	No rows applied	When explicit match between help desk request and coverage row.

Allow Null Selected?	Null is Wildcard Selected?	Add a Coverage Row with Blank Value?	Coverage Rows Applied on SR with Blank Value Specified?	Coverage Rows Applied on SR with Non Blank Value Specified?
Y	N	Y	Blank row applied	When explicit match between help desk request and coverage row.
Y	N	N	No rows applied	When explicit match between help desk request and coverage row.

8. Click **Save and Close**.

The matrix class displays in the **Entitlement Type** drop-down list when you create a standard coverage.

How do I add the milestone to the Manage Service Milestone Configuration Task in Help Desk?

Here's how you can add the milestone to the Manage Service Milestone Configuration task:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Help Desk
   - Functional Area: Service Entitlements
   - Task: Manage Service Milestone Configuration for HR Help Desk or Manage Service Milestone Configuration for Internal Help Desk Requests

   The Manage Milestone Configuration page is displayed.
2. Click **Create Milestone** and specify the following milestone details:
   - **Milestone Label**: Enter the name of the milestone that should be displayed on the help desk request.
   - **Milestone Code**: Select the name of the milestone result column you added to the matrix class. These names are defined in the matrix classes and can't be modified.
   - **Milestone Type**: Select from the following types, which determine whether milestones are reopened or repeated once complete.
     - **Can be reopened**: A milestone that can be reopened is set back to **In Progress** status when the complete criteria is no longer true, and continues the countdown to expiration when reopened. The **Resolution Metric** milestone is of this type.
     - **Can be repeated**: A milestone that can be repeated can't be reopened once closed, but another one is created when the start criteria is valid. For example, suppose you configure a **Next Response Due** milestone that should be repeated each time an employee update is posted to the

help desk request. Once a response is sent, the milestone is complete, but upon receiving a new an employee update, another **Next Response Due** milestone is created and tracked.
    - **Can't be repeated**: A milestone of this type can't be reopened or repeated once it's marked complete. The **First Response Metric** milestone is of this type.
- **Threshold Code**: Select the name of the threshold result column corresponding to the milestone, which you added to the matrix class. This determines the threshold value that's applied to the milestone. The names are defined in the matrix classes and can't be modified.
- **Business Unit Name**: Leave as the default business unit (BU) unless you're configuring milestones for multiple business units. For more information, see the "Configure Milestones for Multiple Business Units" in this guide.
- **Allow Due Date Override**: Select this check box to let agents modify a milestone's due date on the Service Request Milestone Details page (in the **Due Date** field).

  > **Note:** If a customer wants to audit agent updates to the due date, the administrator must enable audit on the **Overridden Due Date** attribute.

- **Allow Agent Completion**: Select this check box to let agents manually acknowledge that they have completed a milestone and close it. On the Service Request Milestone Details page, if an agent selects the **Agent Completed** check box and saves the milestone, the milestone status is updated to **Complete**. Milestones that can be reopened are reopened if the start condition is met again.

  The administrator can specify which milestones allow due date updates and which allow the update to specify a milestone has been completed. These attributes are independent of each other, so that some milestones can allow only moving the due date, others might allow the agent to mark it complete but not move the due date, and still others may allow both types of updates.

3. Enter the milestone conditions. Each milestone (both prebuilt and administrator-defined) has conditions that determine when the milestone starts, pauses, and completes. For each condition, you can define multiple attribute and value pairs that determine when the condition is applied to the milestone.

   - Each tab has a text box that enables you to provide a common description that's displayed in the help desk request details when the milestone is applied to the help desk request. This description enables an agent to understand when a milestone starts counting, when it pauses, and when it's considered complete.
   - Add conditions using the **Create** button in the tab. Use the **Attribute** column to indicate a field to compare to a value using the operator. The **Attribute** column lists administrator-defined fields and a subset of the service request fields that are available to use as conditions. Alternately, you can specify a static condition that doesn't require an operator or value. You can also use object functions written in Groovy, to express more complex start, pause, and stop criteria for milestones.

     - For example, if you specify the field **Problem Type Code**, you must specify the operator (**Is One Of**, **Is Not One Of**) and the values that make this criteria true.
     - Alternately, if you specify a static condition such as **Immediate**, no operator or value is required. In this case, the criteria is considered true as soon as the service request is evaluated.
     - You can specify a logical condition in the form `<attribute> <comparison> <operator values>`.

       For example, you can specify `Status Type` (attribute) `Is One Of` (operator) `Closed, Resolved` (values) as the completion criteria for Resolution Milestone. You can also specify a static predefined condition such as `User Sends Response`, which evaluates to true as soon as any user sends a response message.

       When an object function is written on the help desk request object in Application Composer to return a Boolean value, the function is available as start, pause, and completion criteria. Similar

to the static conditions, when an administrator-defined object function is selected, the operator and values aren't required. When the function returns true, the start, pause, or completion criteria specifying that function is triggered.

- When multiple rows are added as conditions, the results are combined logically using the AND operator, so all rows must evaluate to true for the criteria to be true.

What are some examples of inbound message filters?

Here are some examples of regular expressions for filter patterns of inbound message filters.

Note: Use the ".*" wildcard characters to match 0 or more occurrences of any character.

Filter Type	Regular Expression Example
File attachment	Attachments that are files with either .pdf, .txt, or .html file extensions: .pdf|.txt|.html
Header	Emails with headers that contain the string Gentle Reminder: • ^Gentle Reminder[A-Za-z0-9._%+-]* • ^Gentle Reminder.*
Mime attachment	Content Type header with values such as text/plain, text/html, image/jpeg, or application/octet-stream: text/plain|text/html|image/jpeg|application/octet-stream
Reply to	Emails that are sent by the support team: • support_[A-Za-z0-9._%+-]*@company\.com • support_.*@company\.com
Sender	Emails that are sent by an Oracle employee: • [A-Za-z0-9._%+-]*@oracle\.com • .*@oracle\.com
Subject	Email subjects with string AutoReply: • ^Auto Reply: [A-Za-z0-9._%+-]* • ^Auto Reply.*

How do I assign work to a queue?

Here are the various ways in which you can assign a help desk request to a queue:

- Open a request. From the **Queue** drop-down list, manually select the queue to which you want to assign the request .
- Enable Omnichannel, which runs the queue assignment rules when the request is created or when the queue is deleted from the request .
- Click **Run Queue Assignment** from the **Actions** menu, which runs the queue assignment rules.
- Enable the Assign Help Desk Request to Queue on Create profile option, which runs the queue assignment rules when the request is created. The process is described below.
- Schedule the Queue Assignment job that runs the queue assignment periodically and processes all the open requests that aren't assigned to a queue.

The preferred way of assigning a help desk request 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 request is assigned to the Default queue when the Assignment Manager rules haven't been defined or when the selected request doesn't satisfy any active rule.
- When Omnichannel is enabled, automatic assignment of requests to agents is always enabled on the Default queue.

Suppose you're assigning help desk requests 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 requests can be assigned to the agents.

> **Note:** If you don't assign agents for the automatic queues, requests assigned to those queues could grow exponentially over time. And this causes the application to slow down.

Enable the Assign Help Desk Request To Queue On Create Profile Option to Assign a Request to a Queue

Here's how you enable the Assign Help Desk Request To Queue On Create profile option:

1. Sign in to the application as an administrator.
2. In the Setup and Maintenance work area, click the **Tasks** hamburger icon.
3. Click the **Search** link.
4. Enter Manage Administrator Profile Value in the **Search** field and click **Search**.
5. Click the **Manage Administrator Profile Value** task link.
6. Enter SVC_ASSIGN_TO_QUEUE_ON_CREATE in the **Profile Option Code** field.
7. Click **Search**.
8. In the **Profile Value** drop-down list for the Site **Profile Level**, select **Yes**.
9. Click **Save and Close**.

Note: If Omnichannel is enabled, this profile option is ignored.

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: Help Desk
2. Click **Change Feature Opt In**.
   Select the **Enable** checkbox in the Service Entitlements row.
3. Click **Done**.

Creation of queues and how the default queue works

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

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

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

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

Note:

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

  Here's what Oracle recommends:

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

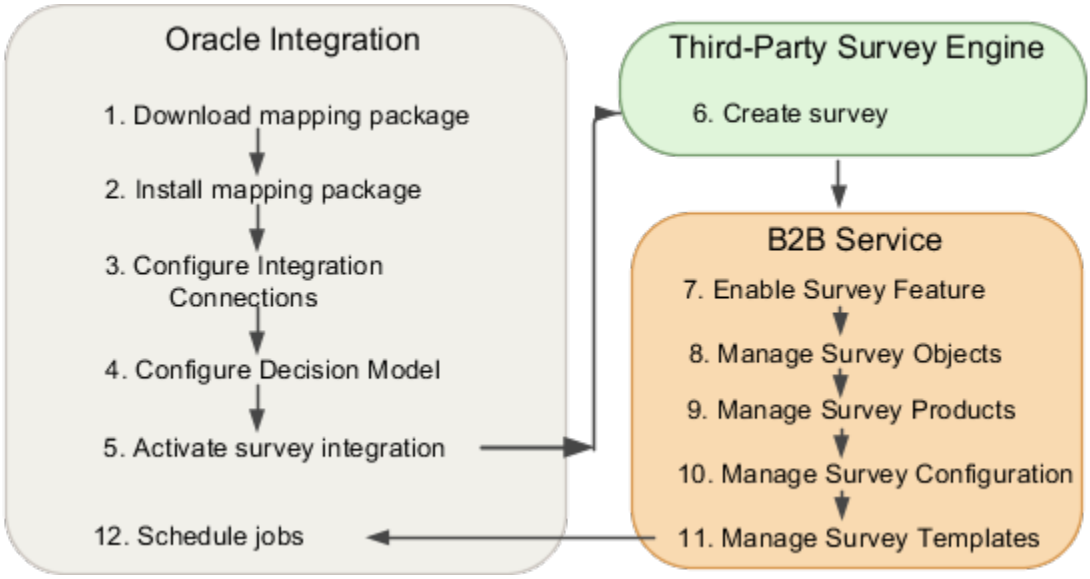
Can I use surveys with Help Desk?

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.



Can I manually close a Help Desk Request?

A help desk request is closed automatically when the Auto-Close HR Help Desk Service Requests or Auto-Close Internal Help Desk Service Requests scheduled process runs as scheduled. Users can't manually close a help desk request.

The auto-close process closes help desk requests that were resolved a specified number of days ago. The number of days for this scenario is set using the SVC_ISR_SR_IN_RESOLVED_DAYS and SVC_HRHD_SR_IN_RESOLVED_DAYS profile options. These mentioned scheduled processes also resolve requests that have been in waiting status for

specified number of days. The number of days for this scenario is set using the SVC_ISR_IN_WAITING_DAYS and SVC_HRHD_IN_WAITING_DAYS profile options.

Note: You can see a list of closed help desk requests by using advanced search, but you can't manually set the status of a request to Closed. Also, after a help desk request is closed, you can't edit the request, add a message, or reopen it.

Related Topics

How do I enable the Help Desk offering and its features?

The Help Desk offering and features must be enabled in order to see them in Setup and Maintenance. Here's how:

1. Sign in to Setup and Maintenance as an Application Implementation Consultant.
2. From the **Actions** drop-down list, select **Go to Offerings**.
3. Click the **Help Desk** offering.
4. Click **Opt In Features** .
5. In the Help Desk row, select the Enable check-box.
6. In the Help Desk row, click the **Edit** icon in the **Features** column.
7. In the Edit Features: Help Desk window, click the **Edit** icon in the **Enable** column.
8. In the Help Desk Usage, click the **Edit** icon in the **Enable** column.
9. Select the usage that you want to use for your implementation. Options are **Internal Service Requests** and **HR Service Requests**.
10. Click **Save and Close** .
11. Click **Done**.
12. In the Opt In: Help Desk page, you can select to enable any other features you're using.
13. Click **Done**.

Note: Some setup tasks will only appear in the table of contents after you enable the associated feature. For example, some of the email setup tasks don't appear in the task list unless the Email Communication Channel feature is enabled.

How do I synchronize worker data loaded through HDL in Help Desk?

After loading the worker data using HCM Data Loader, Oracle recommends running the "Synchronize Person Records" ESS job to synchronize worker data in Help Desk.

The Synchronize Person Records job is used to create or update corresponding TCA person party records for HCM workers.

To Ensure Workers are Properly Synchronized

To ensure workers are properly synchronized, set the following parameters for the Synchronize Person Records job:

- From Date: Enter the load start date
- To Date: Enter the load end date
- After Batch Load: Yes

> **Note:** In the case where the worker data is loaded for more than seven days, you must repeat the process multiple times. In other words, if you have more than seven days, repeat the process (with a maximum date range of seven days) until you're done.

Here are the steps to run the ESS job.

1. From the Navigator, navigate to Tools > Scheduled Processes.
2. Click the **Schedule New Process** button.
3. Search for and select "Synchronize Person Records" in the **Name** field of the Schedule New Process window.
4. Click **OK**.
5. Enter the **From Date** .
6. Enter **To Date**.
7. Select Yes from the **After Batch Load** drop-down list.
8. Click **Submit**.

You can confirm the synchronization when you see the worker is available in the Primary Point of Contact attribute picker.

> **Note:** The Human Resource Help Desk Administrator job role is required to view all worker data in the picker.

Maintain Party and Location Current Record Information

In order to support additional user types like pending workers and nonworkers, **Maintain Party and Location Current Record Information** creates or updates person party records with the party usage. This is required for these additional worker types to display in the contact pickers.

For more details about this job and corresponding profile options, see *Maintain Party and Location Current Record Information*.

How do I configure email for Help Desk?

Use the following tasks to configure email for Help Desk.

Configuring Outbound Email Profile Options

As one of the most common channels of communication, Help Desk Agents often use email to respond to employees and to forward Help Desk requests to other authorized internal resources. In addition, Help Desk uses email to send automatic system responses to employees for events such as the submission of a Help Desk request.

To configure the Help Desk email channel, several configuration activities are recommended.

1. In the Setup and Maintenance work area, use the following:
    - Offering: Help Desk
    - Functional Area: Email Communication Channel
    - Task: Manage Outbound Email Profile Options for HR Help Desk Requests Templates
2. Configure the following profile option types with the appropriate System Response Email Templates.

    The following list shows profile codes that end in '_HRD' and are used in HR Help Desk service requests. Non-HR Help Desk service requests can also use similar profile codes, but without '_HRD' at the end.

    - SVC_SR_RESPONSE_TEMPLATE_NAME_HRD
    - SVC_SR_FORWARD_TEMPLATE_NAME_HRD
    - SVC_SR_SYSTEM_RESPONSE_TEMPLATE_NAME_HRD

Creating a Dedicated Help Desk Inbound Email Channel

To ensure the security of sensitive Help Desk communications, Help Desk includes a dedicated inbound email channel that's separate from the email channel that serves all non-Help Desk requests. To ensure the security of Help Desk communications with employees, the behavior of the Help Desk Inbound Email Channel is different from all other Email Channels, which in turn, ensures the security of Help Desk Requests. All email addresses included in email communications through the Help Desk Inbound Email Channel are added as contacts on an associate's Help Desk Request (enabling communications about the request. No other permissions are granted to these associated contacts).

Now, you create a new email channel using the following procedure:

1. In the Setup and Maintenance work area, use the following:
    - Offering: Help Desk
    - Functional Area: Other Communication Channels
    - Task: Manage Communication Channels
2. Click the **Create Channel** button.
3. In the **Create Channel** view, do the following:
    a. Expand the **Stripe Code** menu, and select either **HR Help Desk Request Stripe** or **Internal Service Request Stripe**.
    b. Expand the **Channel Type** menu and choose the channel type you'd like to create, such as Email.
    c. In the **Account Name** field, provide the email address for which the channel is intended. For example, HRsupport@yourcompany.com.
    d. In the **Channel Code** field, specify a code channel that indicates the communication channel.
    e. In the **Display Name** field, enter the display name that you want for the channel. This is the value that employee users see.
    f. If multi BU is enabled, expand the **Business Unit** menu and choose the correct business unit.
    g. Enable the record by checking the **Active** box.
    h. Click **Save and Close**.

Setting Up Forwarding Rules for Email Channels

Now you create a new forwarding rule on your company email server to redirect emails addressed to your organization's Help Desk email account to the Help Desk address that Oracle provided at the time of provisioning. This rule and address are different from the rule and address used for all other service requests. For example, all the support emails that are sent to HRsupport@yourcompany.com are forwarded to pod_name.fa.intservice.incoming@workflow.mail.em2.cloud.oracle.com for processing. The SVC_INBOUND_EMAIL_ADDRESSES profile option indicates the Oracle email ID to which the support mails must be forwarded. Here's how you set this profile option:

1. In the Setup and Maintenance work area, use the following:
    - Offering: Help Desk
    - Functional Area: Email Communication Channels
    - Task: Manage Inbound Email Profile Options
2. Click the **SVC_INBOUND_EMAIL_ADDRESSES** link, and do the following:
    a. In the **Profile Values** area select New from the Actions drop-down list.
    b. Click the **Profile Level** drop-down list, and select Site.
    c. In the **Profile Value** field, enter the Oracle email ID where support email will be forwarded.
    d. Click **Save and Close**.

It's recommended that you then schedule a reoccurring job to process SR and SR message records.

How do I manage assignment objects and assignment rules for Help Desk?

You can use assignment rules to automatically assign Help Desk requests to queues when the requests are created or updated. You can schedule these rules to run automatically.

Help Desk requests and employee objects are treated as work objects and queues are treated as candidate objects. You can define rules to select the best queue for each request. To create the work objects and corresponding rules use the following setup tasks: Manage Service Assignment Objects and Manage Service Assignment Rules.

Defining Help Desk request assignment rules requires some forethought. Before beginning this procedure, you must consider the following:

- The breakout of queues and agent assignment to the queues.
- The attributes of help desk requests you want to use as criteria for your rule assignments.
- The attributes of the employee records that you want to use as criteria for your rule assignments. The available attributes include:
    - Legal Employer or Entity
    - Country
    - Business Unit
    - Department

- Job
- Location
- Bargaining Unit
- Collective Agreement

- The rule sets you create.
- The rules to include in each role set.

Note: The queues must be created prior to following this procedure.

Manage Help Desk Assignment Objects

In this procedure, you select attributes from the Help Desk request assignment object that you want to make available in your rules. This procedure however, isn't mandatory, as ready-to-use fields are provided for all the objects.

To manage assignment objects:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Help Desk
   - Functional Area: Assignment and Routing
   - Task: Manage Service Assignment Objects

   The Manage Service Assignment Objects page appears.
2. Add the queue attributes you want to be available when setting up your rules:
   a. Click **HR Help Desk Request Queue** or **Internal Service Queue**.
   b. In the Details region, click the **Attributes** subtab.
   c. Add attributes to the list by clicking the **Add** icon, and select **View Object Attribute** from the drop-down list.
   d. Click **Save**.
3. Add the help desk request attributes you want to be available when setting up your rules:
   a. Click **HR Help Desk Request** or **Internal Service Request**.
   b. In the Details region, click the **Attributes** subtab.
   c. Add attributes to the list by clicking the **Add** icon, and select **View Object Attribute** from the drop-down list.
   d. Click **Save**.

Manage Help Desk Assignment Rules

In this procedure you define the rules for assignment.

When assigning work items to queues, follow these guidelines when defining your matching rules:

- The rule set must be defined with Number of Candidates = 1. The application allows only one queue to be assigned to a help desk request.
- You have 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 of 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.

To manage Help Desk request assignment rules:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Help Desk
    - Functional Area: Assignment and Routing
    - Task: Manage Service Assignment Rules
2. On the **Manage Service Assignment Rules** page, select the category **HR Help Desk Request Queuing Rules** or **Internal Service Request Queuing Rules**.
3. Create a new rule set by clicking the **Add** icon in the **Rule Sets** work area, and then enter the required information.
4. Create rules for the rule set by clicking the **Add** icon in the **Rules** work area.

    The Create Rule screen appears.
5. 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 **Add** icon in the **Conditions** work area, and then define the required attribute.

    For HR Help Desk:
    - Select either the **HR Help Desk Queue**, **HR Help Desk Request**, or **HR Help Desk Request Primary Employee Contact** object and the available employee attributes are displayed in the attribute drop-down list.

    For Internal Help Desk:
    - Select either the **Internal Service Queue**, **Internal Service Request** or **Internal Service Request Primary Employee Contact**.

    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. They indicate the following.
    - Not In Including Children: 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. For example, if the condition is set for the Category Name attribute with value Benefit Enrollment, the rule applies only if the value of the top-level attribute matches Benefit Enrollment.
    - In Including Children: Indicates that the rule applies if an attribute value matches with any of the attributes in the parent-child hierarchy of the current attribute. For example, if the condition is set for the Category Name attribute with value Benefit Enrollment, the rule applies even if the value of any of the child attributes matches Benefit Enrollment.
8. Optionally, add more conditions.
9. Select a queue to which the requests meeting the conditions must be assigned by clicking the **Add** icon in the **Action Assign Queue** work area.
10. Click **Save and Publish**.

    The request assignment is now defined.

> **Note:** Republish the assignment rules each time the rule is changed. You also must republish the rules each time the associated queue is deleted, enabled, or disabled.

How do I manage help desk request categories and product usage groups?

Help Desk request categories can help identify the nature of issues reported in help desk requests.

For example, categories can help group requests related to General HR in one category, and requests related to Benefits in another category. Further, categories and child categories can be created to narrow the type of request within one of the ordered groupings.

Administrators can create categories and category hierarchies to group and organize requests depending on their organizational needs. Before creating categories, do the following:

- Create a list of your top-level categories.
- For each top-level category, create a list of child categories.

To create help desk request categories, follow these steps in Setup and Maintenance:

- Offering: Help Desk
- Functional Area: Help Desk Request
- Task: Manage Categories for Internal Help Desk Requests or Manage Categories for HR Help Desk Requests

Create a top-level category:

1. In the **Create Category** list, select **Create Top-Level Category**.
2. Enter a name in the **Category Name** field.
3. Specify if the category must be active, by selecting a value in the **Active** drop-down list.
4. Enter a unique Category Code for the category.

   > **Note:** Category code must be unique across all Business Units and Application stripe.

5. Create additional top-level categories, as needed.

Create child categories:

1. In the **Categories** list, select the top-level category for which you want to create child categories.
2. In the **Create Category** list, select **Create Child Category**.
3. Enter a name in the **Category Name** field.
4. Enter a unique **Category Code**. It must be unique across all business units and application stripes.
5. Specify if the category must be active, by selecting a value from the **Active** list.

   The Business Unit Name column displays the BU associated with the top-level category.
6. Create additional child categories, as needed.

   The child categories appear indented under the top-level category.

   > **Note:** You can set the BU only for the top-level category. The BU on the child categories is automatically set based on the BU of the root category.

Product Usage Groups

Similar to categories, products can also help narrow down service request issues in Help Desk. For example, products can be Payroll Application or Benefits Application. To set up products, use the Manage Product Group Usage setup task in the Setup and Maintenance work area and add products for the Help Desk category.

How do I set up a role with read-only access?

Here's how you set up a role with read-only access to the help desk request header alone, or both the help desk request header and messages:

> **Note:** These steps use the **HR Service Request Management** duty role and **Next Gen Human Resource Help Desk Agent** job role as examples. You can copy any of the Help Desk job and duty role combinations to create a read-only version of that role. For example, **Internal Service Request Management** duty role and **Internal Help Desk Agent** job role

1. Sign into the application as an administrator.
2. Navigate to **Security Console**.
3. Copy a **Help Desk** duty role, such as **HR Service Request Management** .
   When copying the role, select the **Copy Top Role** option.
4. Remove the **Edit HR Service Request** privilege or **Edit Internal Service Request** privilege.
5. Copy a Help Desk job role, such as **Next Gen Human Resource Help Desk Agent**.
   When copying the role, select the **Copy Top Role** option.
6. Delete the HR Service Request Management child role from the copied job role.
7. Associate the copied job role with the users who need read-only access to the header alone, or both the header and messages. Ensure that the users don't have other roles that assign them the **Edit HR Service Request** or **Edit Internal Service Request** privilege.

Related Topics

- Create Job and Abstract Roles
- Copy and Edit Duty Roles
- Copy Job or Abstract Roles

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 Help Desk Request layout.

> **Note:** Required and Read Only are only available if a field in a layout isn't associated with a template.

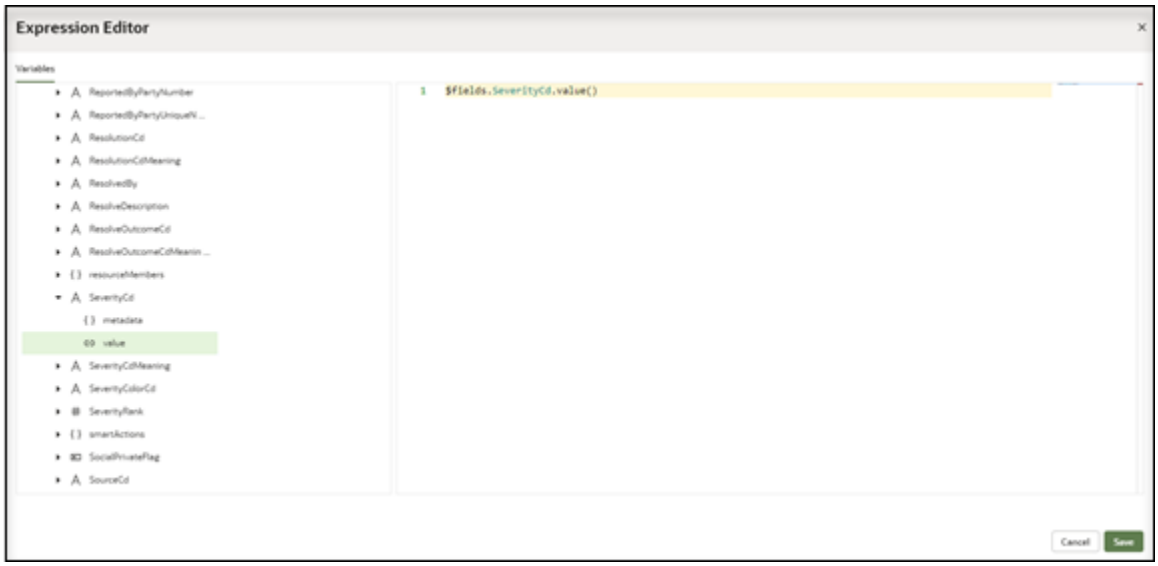
First duplicate the default form if necessary, or choose your own layout, and then do the following:

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 is reached

What are the profile options for Help Desk?

Administrators and setup users manage help desk profile options and schedule job processes from the Setup and Maintenance work area.

Some of the 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 request after N number of days, schedule a job process that closes requests.

To enable the profile options, follow these steps in Setup and Maintenance:

- Offering: Help Desk
- Functional Area: Help Desk Request

- Task: Manage Profile Options for Internal Help Desk Requests or Manage Profile Options for HR Help Desk Requests

The following table describes the various profile options for internal help desk requests:

Internal Help Desk Profile Option	Description
SVC_ISR_IN_RESOLVED_DAYS	Defines the number of days after which any resolved request is automatically closed. This profile option must be used along with the *Auto-Close Help Desk Requests* job process. Make sure the following two conditions are met: • The SVC_ISR_IN_RESOLVED_DAYS profile value must be set to 1 or greater for the Auto-Close Internal Help Desk Service Request job to run. • The SVC_ISR_IN_RESOLVED_DAYS profile value must be set to 0 to disable the Auto-Close Internal Help Desk Service Request job.
SVC_ISR_IN_WAITING_DAYS	Defines number of days for which a help desk request must be in Waiting status before the request is auto resolved. This profile option must be used along with the *Auto-Close Internal Help Desk Service Request* job process. For more information, see *Scheduled Processes for SR Management*. Make sure the following two conditions are met: • The SVC_ISR_IN_WAITING_DAYS profile value must be set to 1 or greater for the Auto-Close Internal Help Desk Service Request job to run. • The SVC_ISR_IN_WAITING_DAYS profile value must be set to 0 to disable the Auto-Close Internal Help Desk Service Request job.
SVC__ISR_AUTO_CLOSED_STATUS_CD	Defines the status code to use for auto-closing requests that have been in Resolved status for at least the number of days specified by SVC_ISR_IN_RESOLVED_DAYS. This profile option must be used along with the *Auto-Close Internal Help Desk Service Requests* job process.
SVC_ISR_AUTO_RESOLVED_STATUS_CD	Defines the status code to use for auto-resolving requests that have been in Waiting status for at least the number of days specified by SVC_ISR_IN_WAITING_DAYS. This profile option must be used along with the *Auto-Close Internal Help Desk Service Request* job process.
SVC_ISR_DEFAULT_SEVERITY_CD	Sets the default Severity value for a new request.
SVC_ISR_DEFAULT_STATUS_CD	Sets the default Status code for a new request.
SVC_ISR_IN_DELETED_DAYS	Defines the number of days after which a deleted request is purged. Although a soft deleted request is in the database, it can't be retrieved or updated from the UI or REST APIs. Once purged, requests are completely removed from the database. This profile option must be used along with the *Purge Deleted Internal Help Desk Service Requests* job process to purge requests. When a soft-deleted request created from an inbound email is purged, all data associated with that request is also purged from the inbound message tables.
SVC_ISR_PROD_CATALOG_USAGE	Internal Help Desk Request Product catalog usage.
ORA_SVC_DELETE_CLOSED_ISR_ENABLED	Enables automatic deletion of a request that has been closed for at least the number of days specified by the ORA_SVC_CLOSED_ISR_RETENTION_DAYS profile option. This profile option must be used along with the Delete Closed Help Desk Requests job process.

Internal Help Desk Profile Option	Description
ORA_SVC_CLOSED_ISR_RETENTION_DAYS	Defines the number of days for which a request must remain closed before it's deleted. Deletion can 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 Help Desk Requests job process.

The following table describes the various profile options for HR help desk requests:

HR Help Desk Profile Option	Description
SVC_HRHD_IN_RESOLVED_DAYS	Defines the number of days after which any resolved request is automatically closed. This profile option must be used along with the *Auto-Close HR Help Desk Service Requests* job process. Make sure the following two conditions are met: • The SVC_HRHD_IN_RESOLVED_DAYS profile value must be set to 1 or greater for the Auto-Close HR Help Desk Service Requests job to run. • The SVC_ISR_IN_RESOLVED_DAYS profile value must be set to 0 to disable the Auto-Close HR Help Desk Service Requests job.
SVC_HRHD_IN_WAITING_DAYS	Defines number of days for which a HR Help Desk request must be in Waiting status before the request is auto resolved. This profile option must be used along with the *Auto-Close HR Help Desk Service Requests* job process. Make sure the following two conditions are met: • The SVC_HRHD_IN_WAITING_DAYS profile value must be set to 1 or greater for the Auto-Close HR Help Desk Service Requests job to run. • The SVC_HRHD_IN_WAITING_DAYS profile value must be set to 0 to disable the HR Help Desk Auto-Close Service Requests job.
SVC__HRHD_AUTO_CLOSED_STATUS_CD	Defines the status code to use for auto-closing requests that have been in Resolved status for at least the number of days specified by SVC_HRHD_IN_RESOLVED_DAYS. This profile option must be used along with the *Auto-Close HR Help Desk Service Requests* job process.
SVC_HRHD_AUTO_RESOLVED_STATUS_CD	Defines the status code to use for auto-resolving requests that have been in Waiting status for at least the number of days specified by SVC_HRHD_IN_WAITING_DAYS. This profile option must be used along with the *Auto-Close HR Help Desk Service Requests* job process.
SVC_HRHD_DEFAULT_SEVERITY_CD	Sets the default Severity value for a new request.
SVC_HRHD_DEFAULT_STATUS_CD	Sets the default Status code for a new request.
SVC_HRHD_IN_DELETED_DAYS	Defines the number of days after which a deleted request is purged. Although a soft deleted request is in the database, it can't be retrieved or updated from the UI or REST APIs. Once purged, requests are completely removed from the database. This profile option must be used along with the *Purge Deleted HR Help Desk Service Requests* job process. When a soft-deleted request created from an inbound email is purged, all data associated with that request is also purged from the inbound message tables.

HR Help Desk Profile Option	Description
ORA_SVC_DELETE_CLOSED_HRHD_ENABLED	Enables automatic deletion of a request that has been closed for at least the number of days specified by the ORA_SVC_CLOSED_HRHD_RETENTION_DAYS profile option. This profile option must be used along with the Delete Closed Help Desk Requests job process.
ORA_SVC_CLOSED_HRHD_RETENTION_DAYS	Defines the number of days for which a request must remain closed before it's deleted. Deletion can 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 Help Desk Requests job process.

The following table describes the various profile options that are shared between Help Desk and B2B Service:

Profile Options Shared with B2B Service	Description
SVC_ENABLE_AUDIT_IN_SR	Enables or disables auditing of field value changes.
SVC_ASSIGN_TO_QUEUE_ON_CREATE	Assigns a Help Desk request to a queue automatically when the request is created. **Note:** The preferred way of assigning to a queue is by using Omnichannel assignment. If Omnichannel is enabled, this profile option is ignored.
SVC_PUID_FORMAT	Defines the format for the unique reference number on each Help Desk request. For example, every Help Desk request number consists of a prefix and radix. Let's say that you select HRHD _ as the prefix and No alphanumeric conversion as the radix. Without this formatting profile option, the Help Desk request numbers are generated as HRHD_1, HRHD_2, and so on. Now suppose you use this formatting profile option and the value is 000000. Then the Help Desk request numbers are generated as HRHD_000001, HRHD_000002, and so on. For more information about configuring the prefix and radix, see "Configure the Prefix and Radix for Help Desk Requests."
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.
SVC_ATTACHMENT_UI	Defines the attachment view for a Help Desk request. There are thee types of attachment options you can provide: • Classic: Enables users to select the type of attachment, category, and enter the name and description for each attachment. • Basic: Enables users to only select file type, browse and upload attachments to the Help Desk request. • Advanced: Enables users to select the type of attachment, category, and enter the name and description for each attachment. You can also upload files with the drag-and-drop feature, or extract all files after they're uploaded.
SVC_EVENT_HISTORY_DAYS_TO_KEEP	Specifies the number of days for which the Help Desk request event history details such as update and create must be retained. The data beyond this value is purged.

Profile Options Shared with B2B Service	Description
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 Employee Entry Help Desk request messages that you have previously created and posted.
SVC_ENABLE_RESOLVE_SR	Enables the ready-to-use workflow for resolving a request. This profile option is disabled by default. When enabled, the Resolve Help Desk Request action on the Action Bar opens a dialog box that captures the outcome and resolution, and enables you to enter resolution notes. **Note:** If this profile option isn't enabled, you can still manually set the Help Desk request status to **Resolved**.
ORA_SVC_DELETE_CLOSED_SR_ENABLED	Enables automatic deletion of a request that has been closed for at least the number of days specified by the ORA_SVC_CLOSED_ISR_RETENTION_DAYS profile option. This profile option must be used along with the Delete Closed Help Desk Requests job process.
ORA_SVC_CLOSED_SR_RETENTION_DAYS	Defines the number of days for which a request must remain closed before it's deleted. Deletion can 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 Help Desk Requests job process.

How do I manage scheduled processes for help desk requests?

You can set various profile options and schedule job processes for help desk request management.

You must use some of the 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 request after N number of days, you should also schedule a job process that closes requests. 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 help desk requests.

Job Process Name	Description
Auto-Close Internal Help Desk Service Requests	Closes requests that were resolved a certain number of days ago, and resolves requests that have been in waiting status for a certain number of days. The number of days for both the scenarios is set using the SVC_ISR_IN_RESOLVED_DAYS, SVC_ISR_IN_WAITING_DAYS profile options respectively.

Job Process Name	Description
Auto-Close HR Help Desk Service Requests	Closes requests that were resolved a certain number of days ago, and resolves requests that have been in waiting status for a certain number of days. The number of days for both the scenarios is set using the SVC_HRHD_IN_RESOLVED_DAYS, SVC_HRHD_IN_WAITING_DAYS profile options respectively.
Delete Closed HR Help Desk Requests	Deletes closed HR Help Desk Requests which have been closed for at least a number of days specified by the ORA_SVC_CLOSED_HRHD_RETENTION_DAYS profile option.
Delete Closed Internal Service Requests	Deletes closed Internal Service Requests which have been closed for at least a number of days specified by the ORA_SVC_CLOSED_ISR_RETENTION_DAYS profile option.
Purge Deleted Internal Help Desk Service Requests	Purges requests and their child records that were deleted a certain number of days ago. The number of days is set using the SVC_ISR_IN_DELETED_DAYS profile option.
Purge Deleted HR Help Desk Service Requests	Purges requests and their child records that were deleted a certain number of days ago. The number of days is set using the SVC_HRHD_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. This job and the corresponding profile options are shared with Fusion Service.
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 requests. This job takes the following parameters: • Work Object Code: Indicates business objects that get assigned to agents, such as, help desk requests. Expected Value: ORA_HRHD_Service_Request_Work_Object or ORA_ISR_Service_Request_Work_Object • Candidate Object Code: Indicates objects that are the possible pool of assignment candidates, such as queues. Expected Value: ORA_HRHD_Queue_Candidate_Object or ORA_ISR_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. • View Criteria Name: Indicates the view criteria used to identify the requests to be assigned. Expected Value: **`OpenSRsUnassignedToQueueHRHD`** • Bind Variable: Indicates the bind variables required for the view criteria. Expected Value: **`bindStripeCd=ORA_SVC_HRHD`** or **`bindStripeCd=ORA_SVC_ISR`** • 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 requests. This is used if your object support Enterprise logging for assignment. • Diagnostic Mode (check box): Indicates if the process must be run in diagnostic mode to view the details of assignment processing in an output log.

Job Process Name	Description
	Note: This job is shared with Fusion Service but should be set up with a separate parameter for Help Desk. If OMNI is enabled, there isn't a need to run a batch Assignment job. You can add rule condition and assign that rule to Queue 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 requests.
Aggregate Service Requests	Enables querying 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. This job is shared with Fusion Service.
Monitor Service Request Milestones	Ensures that the request and milestone status are up-to-date and sends an email notification if compliance issues or warning flags are found. This job is shared with Fusion Service.
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. This job is shared with Fusion Service.
Monitor Action Plan Actions	Evaluates the status of an action plan. This job is shared with Fusion Service.
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. This job is shared with Fusion Service.
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: • The first time data is loaded. • Any time the data needs to be refreshed from a specific date. This job is shared with Fusion Service.
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 accurate reporting. The recommended frequency for running this job is 1 hour.

Job Process Name	Description
	This job is shared with Fusion Service.
Migrate Service Business Unit Data	Migrates the following business objects from one business unit (BU) to another: • Category • Channel • Milestone Configuration • Service Request This job is shared with Fusion Service.
Execute Incremental Load of SR Audit Data for Reporting	Incrementally loads request audit data added since 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. This job is shared with Fusion Service.
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. This job is shared with Fusion Service.

How do I enable the ability to add all contacts and team members or add additional email recipients?

Sometimes while composing an email, an employee might want to add extra email recipients who aren't contacts or resources.

For these options to be available to them, you must enable the SVC_ENABLE_ADDITIONAL_EMAIL_RECIPIENTS profile option. The default value of this profile option is No.

To enable the SVC_ENABLE_ADDITIONAL_EMAIL_RECIPIENTS profile option:

1. Sign in 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. Search for and select the Manage Administrator Profile Values task.
5. On the Manage Administrator Profile Values page, navigate to the Search region.
6. In the **Profile Option Code** field, type `SVC_ENABLE_ADDITIONAL_EMAIL_RECIPIENTS`.
7. Click **Search**.
   The SVC_ENABLE_ADDITIONAL_EMAIL_RECIPIENTS profile option is displayed in the Search Results: Profile Options region.
8. In the Profile Option Levels region, set the **Profile Value** for the Site **Profile Level** as **Yes**.

9. Click **Save**.

What happens when an employee sends a help desk email?

If an employee sends an email, then the email ID in the From field is validated against the employee record in the database. If a match is found, and the email is for a new help desk request, then a new request is created.

If a match to the email ID isn't found in the database, then the following applies:

- The value for the SVC_EMAIL_PROCESS_UNKNOWN_CUST profile option is selected. This option specifies how to process an incoming email from unknown employees.
- If the SVC_EMAIL_PROCESS_UNKNOWN_CUST profile option is set to **Y**, a new request is created. However, a message is sent to the employee indicating that they can't be identified and must provide valid information for further processing of the request.
- If the SVC_EMAIL_PROCESS_UNKNOWN_CUST profile option is set to **N**, no request is created.

Note: All the recipients of the incoming email, including the unknown contacts are listed in the Messages tab.

What are the job and duty roles for Help Desk?

Many security roles are predefined in the Help Desk and HR Help Desk offerings. Here's a list of the job and duty roles for Internal Help Desk and HR Help Desk with descriptions.

The following table lists the Internal Help Desk and HR Help Desk job roles.

Job Role	Description
Internal Help Desk Administrator Next Gen Human Resources Help Desk Administrator	Manages setup and configuration.
Internal Help Desk Agent Next Gen Human Resources Help Desk Agent	Creates requests on behalf of employees and manages requests.
Internal Help Desk Manager Next Gen Human Resources Help Desk Manager	Manages a group of Agents (as defined in the Resource Hierarchy) or is responsible for reviewing and analyzing help desk metrics.
Internal Help Desk User	Requests support to resolve their questions and issues.

Job Role	Description
Next Gen Human Resources Help Desk User	

The following table lists the **duty roles** specific to the Help Desk offering.

Duty Role	Description
Internal Service Request Administration HR Service Request Administration	Manage all aspects of help desk requests. In addition, can manage queues and administer the help desk service application, including setup.
Internal Service Request Analysis HR Help Desk Analysis	Manages group of agents. Can view requests, activities, and attachments. Monitors metrics and overall resource balancing, critical requests, SLAs.
Internal Service Request Creation HR Service Request Creation	Requests support to resolve their related questions and issues.
Internal Service Request Management HR Service Request Management	Manages all aspects of the request object.

What roles does the Help Desk product support?

Help Desk supports questions and requests for internal employees, contingent workers, and nonworkers. It can be used for any type of support, such as Human Resources, Maintenance Requests, ERP, Sales, or Facilities.

There are two stripe codes associated with Help Desk in the Redwood experience. Human Resources requests have their own stripe code, HRHD, to provide an added layer of security and separate sensitive Human Resources data from other types of requests. All other types of requests use the stripe code ISR for Internal Service Requests, which is used for any support for employees other than Human Resources.

Think of Internal Requests as any type of support for your employees, other than Human Resources.

Help Desk is a separate offering in Setup and Maintenance and has employee and agent flows that you can configure by the type of support you're implementing. After enabling the offering, most HR Help Desk and Internal Service Requests features are enabled and setup separately.

Help Desk has built-in capabilities for a self-service employee's My Help page to search knowledge, view existing help desk requests, or create new requests. In addition, agents working on requests manage their work through a request list page that includes assignment and routing, milestones, action plans, knowledge search, messaging with the request owners, and collaboration across the enterprise.

How do I create a saved search?

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

Here's how you create a saved search:

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

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

How do I make my saved search the default search?

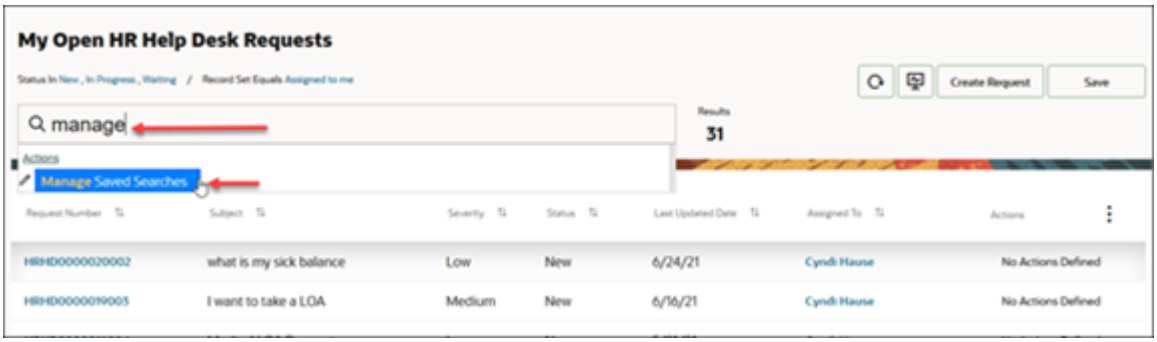
Here's how you can manage the saved searches you created including making your saved search the default search.

Note:

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

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

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



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

2. (Administrators only) Use the **Visible To** drop-down list to filter the list of saved searches displayed on the page.
3. Click **Actions** > **Edit** to change any of the saved searches you created. You can:
    - Rename the saved search.
    - Choose to share this saved search with only yourself, everyone, and (if you've the required permissions) you can share it with specific roles.
4. Click the drop-down list and select **Delete** to delete any of the saved searches you created.

    To exit the **Manage Saved Searches** page, click the back button on your browser.
5. Click **Save** after your changes are done.
6. Click **Actions > Set as Default** to set the saved search as the default saved search.
7. Click **Actions > Hide from List** to hide the saved search from being displayed on the list page.

    To bring it back, go to the **Manage Saved Searches** page, click **Actions** > **Show in List** .
8. Click **Actions > Delete** to delete any of the saved searches you created.
9. Click **Done**.

What are the roles for Help Desk?

Provision the roles to enable access to Help Desk. These roles include:

Internal Help Desk

- Internal Help Desk Administrator
- Internal Help Desk Agent
- Internal Help Desk Manager
- Internal Help Desk User

HR Help Desk

- Next Gen Human Resources Help Desk Administrator
- Next Gen Human Resources Help Desk Agent
- Next Gen Human Resources Help Desk Manager
- Next Gen Human Resources Help Desk User

Both HR Help Desk and Internal Help Desk

- Knowledge Analyst
- Knowledge Manager
- Employee

Note: Help Desk Users that own help desk requests (for example, agents and managers) must be set up as Resources. The happens during the creation of an Employee record in the New Person UI. Once you save the new employee record with a selected Resource Role, a TCA party is created for the resource. A new resource then shows up in the Resource Directory, which may or may not be associated with a Resource Organization. From the Resource Directory, you can put the resource into the correct Resource Organization at the correct level. This resource hierarchy setup is required for team reporting to roll up to a manager. Also, for manager visibility of Help Desk requests that the agents on their team are working on. If a person is an administrator for both Internal Help Desk and Next Gen Human Resources Help Desk, two different accounts should be used for these.

How do I resolve a request?

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

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

1. Open the Help Desk Request Overview page for the service request you want to resolve.
2. In the **Action Bar**, enter **Resolve**.
   You can also enter synonyms such as **Close** or **Complete**.
3. Select **Resolve Service Request** from the list of suggested actions.
   The **Resolve Service Request** panel is displayed.

   Note: The values in the drop-down lists in the **Resolve Service Request** panel are configured by your administrator. The following steps are an example of the resolve flow based on the ready-to-use data provided in the application. You need to select the appropriate values for the service request.
4. From the **Status** drop-down list, select **Resolved**.
5. Select an **Outcome**.
6. Select a **Resolution**.
7. In the **Solution Description** field, enter the details explaining about the solution of the problem.
   You can insert SmartText by typing # to display a list of plain SmartText entries, and type-ahead to progressively search and filter this list.
8. Click **Resolve**.

What are the analytics roles in Help Desk?

The Help Desk analyses are visible for the Next Gen Human Resource Help Desk Agent, Next Gen Human Resource Help Desk Manager, Next Gen Human Resource Help Desk Agent, Internal Help Desk Agent, Internal Help Desk Manager, and Internal Help Desk Administrator job roles.

Analyses and the underlying data is secured through a set of delivered OTBI transaction analysis duty roles. These duty roles are assigned to the help desk agents, managers, and administrators and determine what analyses can be accessed by each. These OTBI transaction analysis duty roles control the subject areas and analyses a user can access. These roles also control the data that the signed in user can see in the analyses. This aligns with the data security privileges for the user in the transaction system.

The administrator defines which users, application roles, and catalog groups have the following privileges:

- Receive the delivery content of an agent.
- Have permission to access a section or alert section in a dashboard.
- Have permission to use a saved modification.
- Have permission to add or edit an existing catalog group.
- Assign permissions to a catalog object.

Here's a table that shows the job and duty role mapping required for a user to access the Service analyses:

Infolet Name	Job Role	BI Duty Role
Help Desk Requests Pending My Actions	• Internal Help Desk Agent • Internal Help Desk Administrator • Next Gen Human Resource Help Desk Administrator • Next Gen Human Resource Help Desk Agent	• Internal Help Desk Agent Transaction Analysis Duty • Internal Help Desk Administrator Transaction Analysis Duty • Next Gen HR Help Desk Administrator Transaction Analysis Duty • Next Gen HR Help Desk Agent Transaction Analysis Duty
Help Desk Requests Pending Worker Action	• Internal Help Desk Agent • Internal Help Desk Administrator • Next Gen Human Resource Help Desk Administrator • Next Gen Human Resource Help Desk Agent	• Internal Help Desk Agent Transaction Analysis Duty • Internal Help Desk Administrator Transaction Analysis Duty • Next Gen HR Help Desk Administrator Transaction Analysis Duty • Next Gen HR Help Desk Agent Transaction Analysis Duty
My Resolve Time	• Internal Help Desk Agent • Internal Help Desk Administrator • Next Gen Human Resource Help Desk Administrator • Next Gen Human Resource Help Desk Agent	• Internal Help Desk Agent Transaction Analysis Duty • Internal Help Desk Administrator Transaction Analysis Duty • Next Gen HR Help Desk Administrator Transaction Analysis Duty • Next Gen HR Help Desk Agent Transaction Analysis Duty
Critical Help Desk Requests	• Internal Help Desk Manager • Internal Help Desk Administrator • Next Gen Human Resource Help Desk Manager • Next Gen Human Resource Help Desk Administrator	• Internal Help Desk Manager Transaction Analysis Duty • Internal Help Desk Administrator Transaction Analysis Duty • Next Gen HR Help Desk Manager Transaction Analysis Duty • Next Gen HR Help Desk Administrator Transaction Analysis Duty
Unassigned Help Desk Requests by Queue	• Internal Help Desk Manager • Internal Help Desk Administrator	• Internal Help Desk Manager Transaction Analysis Duty

Infolet Name	Job Role	BI Duty Role
	• Next Gen Human Resource Help Desk Manager • Next Gen Human Resource Help Desk Administrator	• Internal Help Desk Administrator Transaction Analysis Duty • Next Gen HR Help Desk Manager Transaction Analysis Duty • Next Gen HR Help Desk Administrator Transaction Analysis Duty
My Team Average Time to Resolve Closed SRs	• Internal Help Desk Manager • Internal Help Desk Administrator • Next Gen Human Resource Help Desk Manager • Next Gen Human Resource Help Desk Administrator	• Internal Help Desk Manager Transaction Analysis Duty • Internal Help Desk Administrator Transaction Analysis Duty • Next Gen HR Help Desk Manager Transaction Analysis Duty • Next Gen HR Help Desk Administrator Transaction Analysis Duty

Related Topics

What subject areas are available in Help Desk Analytics?

Creating analyses begins with subject areas. A subject area is a functional grouping of the contextual entities (also called dimensions) by which the metrics (also called facts) can be analyzed. Subject areas are the building blocks of analytic content in OTBI.

For example, the columns in a tabular report showing the number of open SRs (metric or fact) by Agent Name (context or dimension) are sourced from one of the subject areas. Multiple subject areas can be joined to produce reports, when cross functional analysis is needed.

The Help Desk application comes with various standard subject areas for you to select from when you're building or editing your analytics.

HR Help Desk Subject Areas

- Help Desk - HR Service Requests Real Time
- Help Desk - HR Service Request Messages Real Time
- Help Desk - HR Service Request Lifecycle
- CRM/Help Desk - Omni Channel Events Real Time
- CRM/Help Desk - Inbound Messages Real Time

Internal Help Desk Subject Areas

- Help Desk - Internal Service Requests Real Time
- Help Desk - Internal Service Request Messages Real Time
- Help Desk - Internal Service Request Lifecycle
- Help Desk - Internal Help Desk Request Milestones Real Time

- CRM/Help Desk - Omni Channel Events Real Time
- CRM/Help Desk - Inbound Messages Real Time

For more Help Desk analytics resources, see: *Where do I find more information about and resources for Help Desk analytics?*

How do I associate assets and work orders to Help Desk work requests?

Help Desk Requests can be used as work requests to report facility and asset-related maintenance issues. The requests can be associated with an asset and ultimately a work order for resolution.

The requests contain information about the nature of the discrepancy, asset (if known), and a description of the problem. Work Requests are sorted and then assigned for resolution using maintenance work orders.

Create the Enable Work Request Profile Option

Before you enable work requests, you must create the work request profile option.

In Setup and Maintenance go to the following:

1. Click the **Tasks** icon.
2. Click the **Search** link.
3. Enter Manage Profile Options in the **Search** field.
4. Click the **Search** icon.
5. Click the **Manage Profile Options** link.
6. On the Manage Profile Options page, in the **Search Results** region click the **Add** icon.
7. On the Create Profile Option page, enter the following:
    - **Profile Option Code**: SVC_NG_ENABLE_MAINTENANCE_HELPDESK
    - **Profile Display Name**: SVC_NG_ENABLE_MAINTENANCE_HELPDESK
    - **Application**: Service
    - **Module**: Service
    - **Description**: Add a description
    - **Start Date**: Add a Start Date
    - **End Date**: Add an End Date if applicable.
8. Click **Save and Close**.
9. Click **Save and Close** on the Manage Profile Options page.
10. Click **Done**.

Setup and Enable the Work Request Profile Option

To enable this functionality you must license and enable the Help Desk offering for Internal Service Requests. Additionally, you must set the profile option you just created to expose Asset and Work Order details in the pages.

1. Click the **Tasks** icon.

2. Click the **Search** link.
3. Enter Manage Administrator Profile Values in the **Search** field.
4. Click the **Search** icon.
5. Click the **Manage Profile Options** link.
6. On the Manage Administrator Profile Values page, enter the **Profile Option Code**: SVC_NG_ENABLE_MAINTENANCE_HELPDESK
7. Click **Search**.
8. In the **Profile Values** region, set the **Profile Value for Site** to Y.
9. Click **Save and Close**.
10. Click **Done**.

Note: To submit a Work Request for an Asset, you don't need any additional subscription. However, to manage a Work Request for an Asset and create Work Orders, you must have an Oracle Sales and Service Enterprise Subscription.

What's a sample groovy script for a notification for when a help desk request is assigned?

Here's a sample code to trigger a notification to be sent to the recipient specified in the Notification Preferences page when the help desk request is assigned:

Note: This sample script uses the object **HR Help Desk Request**. Change the object to **Internal Service Request** if you're using this script for Internal Service Requests.

```
/* DISCLAIMER: This trigger is provided only as a reference.
* TRIGGER TYPE: Before Update in Database
* OBJECT: HR Help Desk 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())
 }
}
```

How can I add fields to the Help Desk request UI?

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.

What high-level steps do I need to do for creating Help Desk users?

At a high level, here are the steps you need to follow to create users and resources for Help Desk:

1. Define and Create Setup Users
2. Create Help Desk Users with Next Gen Human Resource Help Desk User or Internal Help Desk user roles
3. Set up Resource Users for Agents and Managers
4. Set up Resource Team and Resource Hierarchy
5. Synchronize Worker Data

What's Case Management?

Case Management provides the ability to manage long running processes to meet an organization's needs managing escalations, investigations, problems, applications, and other complex issues.

For example, a case can be created when a help desk complaint requires a formal grievance or disciplinary action process. In this way cases allow an organization to address issues that stretch over a long periods of time, require complex business processes for successful completion, or have outcomes that can be difficult to predict or measure.

How do I manage Digital Assistant for Help Desk?

You can configure Next Generation Help Desk as a skill in Digital Assistant, which makes it available to Help Desk users in multiple supported channels such as SMS, Slack, and messenger applications.

End users benefit from Digital Assistant's artificial intelligence-driven conversational engagement while creating, searching, and updating Help Desk requests.

The Help Desk delivered skill is 'Helpdesk' and it includes three intents; Create Request, Get Request and Search Knowledge. The Create Request intent prompts users for information such as request description, category, attachment and asset (for non-HR help desk requests). The Get Request intent includes both searching for and updating a help desk request. When a user enters a phrase, digital assistant checks whether that phrase matches a Help Desk intent. For example, these user phrases match the create help desk request:

- Create ticket
- Create a help desk request
- Create request

> **Note:** If a user gives an intent of Create Request and has privileges for both HR Help Desk and Internal Help Desk, the user will be prompted to decide which type of request should be created.

Help Desk skills are integrated with Knowledge skills. Starting a flow with a knowledge search can move into the create service request skill and then will pass the category from the last reviewed knowledge article.

Digital assistant uses its training data to extend matching to similar phrases over time. You can also extend digital assistant skills to meet specific business requirements. Learn more about skills and extending skills in the Digital Assistant guide.

Related Topics

- Oracle Fusion Cloud Applications Getting Started with Oracle Digital Assistant for Fusion Applications

How do I configure Visual Builder Studio for Help Desk?

This topic explains the Next Generation Help Desk delivered page layouts for configuration with Visual Builder Studio.

Note: Oracle recommends having only one active extension at a time, and that extension should contain all the changes you've made. Independent extensions aren't synced, so having two actively deployed extensions can result in one overriding changes in the other. Having one extension also gives you a complete view of all the changes that have been made to date.

My Help

My Help is a landing page that contains one dynamic container with three sections:

- Popular Articles
- Help Desk Request List
- Quick Links (hidden section for adding quick links for commonly asked questions)

Help Desk Request Create Page

The Help Desk Request Create page contains one dynamic container with two sections:

- Help Desk Request header (dynamic form to add, remove, reformat, and conditionally render format)
- Attachments

Help Desk Request Summary

The Help Desk Request Summary contains one dynamic container:

- Left Hand Panel Spotlight (dynamic form to add, remove, reformat, and conditionally render format)

Help Desk Request Full Edit Page

The Help Desk Request Full Edit page has one dynamic container with multiple sections:

- Help Desk Request header (dynamic form to add, remove, reformat and conditionally render format).
- Contacts, Teams, and Maintenance Work Orders (dynamic tables to add and remove fields)
- The dynamic container is extendable and can be used to do two things.
    - Rearrange the existing content.
    - Add your own components to the display, as long as certain conditions are met at runtime.

  For more information, see the Extending Oracle Cloud Applications with Visual Builder Studio guide link at the end of this topic.

Action Plan

Action Plan is a dynamic form on the Help Desk Request Summary page.

Related Topics

How do I use Adaptive Search for Help Desk?

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

1. In the Setup and Maintenance work area, open the **Configure Adaptive Search** task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Configure Adaptive Search
2. On the Configure Adaptive Search page, click the **Setup** tab.
3. On the Setup tab, **Quick** subtab, select the objects you want to enable for Adaptive Search:
    - HR Help Desk Request
    - Internal Service Request
    - Help Desk Contact
4. Click **Publish**.

    Your action runs an indexing process and an hourly index refresh for the objects you selected. You can monitor the progress of the indexing process on the Monitor tab. The process can take several minutes to complete, depending on your data volume.
5. Click the **Monitor** tab and **Publish** subtab to monitor the process. If the process completes with errors, contact your help desk.

What's a sample Groovy script for when a Help Desk request is resolved?

Here's a sample code to trigger a notification to be sent to the recipient specified in the Notification Preferences page when the Help Desk request is resolved:

> **Note:** You must set the SVC_ENABLE_RESOLVE_SR profile option for the request resolved Groovy script to work correctly. This sample script uses the object HR Help Desk Request. Change the object to Internal Service Request if you're using this script for Internal Service Requests.

```
/* DISCLAIMER: This trigger is provided only as a reference.
* TRIGGER TYPE: Before Update in Database
* OBJECT: HR Help Desk Request
* Use Case: Send a notification to the primary contact when an SR has been resolved.
* Note: You can override the Notification Text and Recipients using the Notification Preferences page.
```

```
if (isAttributeChanged('StatusCd')&& StatusCd == 'ORA_SVC_HRHD_RESOLVED') {
 try {
 def recipientPartyId = PrimaryContactPartyId
 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 resolved.")
 } 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 define system-access-group-based data security policies?

Let's say you're an HR Help Desk Administrator, Internal Help Desk Administrator or IT Security Manager. Then you can use system access groups and predefined rules to support help desk request data security for your users.

Every standard job role provided by Oracle has a corresponding system access group. The predefined object-sharing rules assigned to each system access group provide the same access to help desk request data as provided by the standard job roles.

> **Note:** System access groups provide you an alternative way to manage a user's access to help desk request data. You can also create access extension rules to extend the access provided by the predefined rules to related objects.

System access groups are active by default. But the predefined object-sharing rules associated with each system access group are inactive by default. So you must activate these rules before you can use them. The association between system groups and predefined rules is also disabled by default. So for each system group, you must also enable the predefined rules you want to apply to the group.

The following table lists the predefined object-sharing rules for system access groups along with their descriptions.

S. no.	Predefined rule name	This rule provides access to:
1	All Service Requests	All service requests.
2	All CRM Service Requests	Access to all CRM service requests.

S. no.	Predefined rule name	This rule provides access to:
3	CRM Business Unit Service Requests	All CRM service requests associated with the user's business units.
4	CRM Partner Service Requests	All CRM partner service requests.
5	CRM Business Unit Partner Service Requests	CRM partner service requests associated with the user's business units.
6	CRM Service Request Queue Member	All CRM service requests assigned to queues that the user is a member.
7	CRM Service Request Queue Member Hierarchy	All CRM service requests assigned to queues that the user's subordinates are a member.
8	CRM Service Request Team	All CRM service requests where the user is on the SR team.
9	CRM Service Request Team Hierarchy	All CRM service requests where the user's subordinates are on the SR team.
10	CRM Service Request Assignee	All CRM service requests where the user is the assignee.
11	CRM Service Request Assignee Hierarchy	All CRM service requests where the user's subordinates are the assignee.
12	CRM Service Request Creator	All CRM service requests where the user created the SRs.
13	CRM Service Request Creator Hierarchy	All CRM service requests where the user's subordinates created the SRs.
14	CRM Service Request Partner Account	All service requests where the SR is associated with the user's partner account.
15	CRM Service Request Contact	All CRM service requests where the user is an SR contact.
16	All HR Service Requests	All HR service requests.
17	HR Business Unit Service Requests	All HR service requests associated with the user's business units.
18	HR Service Request Queue Member	All HR service requests assigned to queues that the user is a member of.

S. no.	Predefined rule name	This rule provides access to:
19	HR Service Request Queue Member Hierarchy	All HR service requests assigned to queues that the user's subordinates are a member of.
20	HR Service Request Team	All HR service requests where the user is on the SR team.
21	HR Service Request Team Hierarchy	All HR service requests where the user's subordinates are on the SR team.
22	HR Service Request Creator	All HR service requests where the user created the SRs.
23	HR Service Request Primary Contact	All HR service requests where the user is the SR primary contact.
24	HR Service Request Assignee	All HR service requests where the user is the assignee.
25	HR Service Request Assignee Hierarchy	All HR service requests where the user's subordinates are the assignee.

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

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

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

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

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

How do I Set Up a Microsoft Teams Channel?

Using Microsoft Teams, your agents can collaborate with subject matter experts to resolve employee questions and issues faster. Here's the sequence of steps that you must complete to set up the integration of your service application with Microsoft Teams:

Note: Each of these steps is described in a separate topic, and you must complete them in the given order.

Step no.	Name of topic
1	Create a Microsoft Teams App for Help Desk
2	Set Up a Bot User for Your Microsoft Teams App
3	Register Your Microsoft Teams App in the Azure Portal
4	Enable Collaboration With Microsoft Teams in FSM
5	Update FSM with Credentials of Your Microsoft Teams App
6	Create a Microsoft Teams Channel in Help Desk
7	Enable Notifications to Microsoft Teams
8	Create a Collaboration Action
9	Create a Child Action for a Collaboration Action
10	Create a Child Action for the Reply to Help Desk Request Child Action
11	Configure the FND_IDP_PROXY_USER_WHITELIST Profile Option
12	Upload Your Microsoft Teams App
13	Install Your Microsoft Teams App and Add It to Your Team

How do I install the Microsoft Teams app and add it to my team?

After you upload your Microsoft Teams app, you must install the app and add it to your team in Microsoft Teams. Here's how:

1. In Microsoft Teams, go to the **Apps** tab and click **More apps**.

   In the **Built by your org** region of the Apps page, you can see the Microsoft Teams app that you created for Oracle Help Desk.

   > **Note:** If you've created multiple apps, you can see all them here.

2. Click the app that you want to install.
3. From the **Open** drop-down list, click **Add to a team**.

   In the **Type a team or channel name** region, your channel is selected by default.
4. If you've created multiple apps, you can select the app of your choice by clicking the cross mark.
5. Click **Set up a bot**.

   Your Microsoft Teams app is now installed for the team associated with the channel selected in step 3.
6. Navigate to **Teams** in the navigation bar.
7. Click the ellipsis next to your app name.
8. Click **Manage teams**.

   A page with your team name is displayed.
9. Click the **Apps** tab.

   Your Microsoft Teams app is now displayed in the list of apps.

How do I collaborate with Slack?

Using Slack, your help desk agents can securely collaborate with subject matter experts to quickly resolve employee questions and issues.

You can integrate your help desk application with Slack using two different methods. These methods are described in detail in the Slack Channels chapter of the Oracle Fusion Service Implementing Service guide.

> **Note:** The Send Additional SR Fields to Slack section isn't applicable for Help Desk. So you can ignore the following topic in that section: Send Additional Fields When an SR Is Forwarded to Slack.

Related Topics

- Overview of Setting Up a Slack Channel for your Fusion Application
- How You Set Up a Slack Channel for Your Fusion Application: Method 2

How do I create an email channel for collaboration or internal conversations?

Agents can have internal conversations on requests when you've set up a separate email channel for internal messages. When the agent wants to start an internal message, they select the internal channel.

To create a separate email channel, create a new channel and set the **Purpose** field for the channel to **Collaboration**.

When starting the internal conversation, the agent must select the internal channel. For example `internal@mycompanydomain.com` Replies appear in the conversation.

For external communications, agents still use the channel you created for the requests. For example `support@mycompanydomain.com` Replies are captured as messages on the request.

Also see the topic: *How do I configure email for Help Desk?*

Where do I find more information about and resources for Help Desk 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 job roles do I grant to users for Help Desk?

Here's a list of job roles for employees and agents for Help Desk. When you've successfully enabled the interface for the Redwood experience and granted access to users, the new icons for Help Desk appear on the Home Page.

HR Help Desk

Employee:

- Next Gen Human Resources Help Desk User

Agent:

- Next Gen Human Resource Help Desk Agent
- Next Gen Human Resource Help Desk Manager

Administrator:

- Next Gen Human Resource Help Desk Administrator

Internal Help Desk

Employee:

- Internal Help Desk User (Internal – non-HCM SRs)

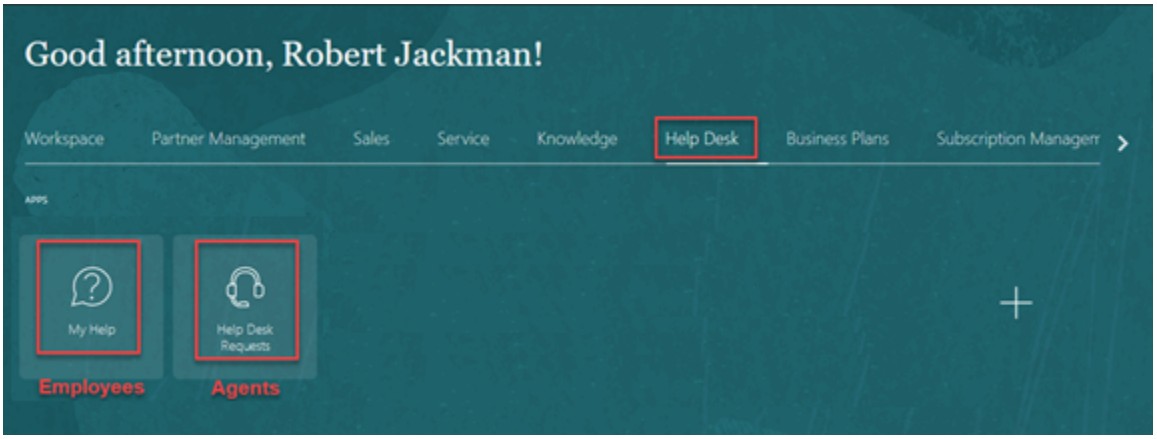
Agent:

- Internal Help Desk Agent
- Internal Help Desk Manager

Administrator:

- Internal Help Desk Administrator

Once the access is granted and you've enabled the interface for the Redwood experience, new icons for Help Desk appear on the Home Page.



Related Topics

- What's a resource team?
- How do I manage resource teams?
- How do I synchronize worker data loaded through HDL in Help Desk?

Can I have the product and category auto-populate when a help desk request is created from an inbound email?

You can use the HR Service Request Classification and Internal Service Request Classification feature to have **Product** and **Category** auto-populate on a request when it's created through an 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 help desk requests 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 HR Service Request Classification and Internal Service Request Classification 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 Help Desk.
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 restrict contact search results?

You can restrict the user's visibility of contacts in the contact picker based on HCM data security visibility.

By default, all contacts are displayed in the contact picker for the Human Resource Analyst. To restrict their visibility, use the ORA_HELPDESK_CONTACT_DATASECURITY profile option. Here's how to enable that profile option:

1. Navigate to Setup and Maintenance.
2. Click the **Tasks** icon.
3. Click the **Search** link.
4. Enter Manage Administrator Profile Values in the **Search** field.
5. Click **Search**.
6. Click the **Manage Administrator Profile Values** link.
7. Enter the **Profile Option Code** ORA_HELPDESK_CONTACT_DATASECURITY.
8. Click **Search**.
9. In the Profile Values section, change the default **PublicPerson** to **Person**. This limits results by HCM data security. The default "PublicPerson" displays all contacts.
10. Click **Save and Close**.
11. Click **Done**.

How do I enable Elastic Search for the Help Desk object?

Elastic search is used for the Next Gen Help Desk request list and is enabled in the Sales Offering.

Enable Elastic Search

1. Navigate to Setup and Maintenance.
2. Click the **Tasks** icon.
3. Click **Search**.
4. Enter the task name Configure Adaptive Search.
5. Click **Search**.
6. Click the Configure Adaptive Search task link.
7. On the Configure Adaptive Search page, select the **Setup** tab.
8. In the **Service** section, click the check box to enable either the **HR Help Desk Request** object, or the **Internal Service Request** object.
9. From the Actions menu, select **Partial Publish**.
10. Click both HR Help Desk Request and Case.
11. Click **Proceed with Partial Publish**.
12. Click **Publish**.
13. Click **OK** on the warning message.
14. Select the **Monitor** tab.
15. Click **Start Process** to start the Elastic Search indexing.

    > **Note:** This job will continue to run in the background. It is initially very common for there to be errors. Start the process again until you see a Wait status. As long as the job is running, you won't see REST API errors from this search in Help Desk.

16. Verify that you see the job in WAIT status.

Enable Group By (Optional)

While you're in the Configure Adaptive Search task you may want to consider enabling Group By so your agents can view requests by groupings on the List page. For example group by New requests. To enable Group By do the following:

1. If you're not already in the Configure Adaptive Search task from the previous procedure:
2. Navigate to Setup and Maintenance.
3. Click the **Tasks** icon.
4. Click **Search**.
5. Enter the task name Configure Adaptive Search.
6. Click **Search**.
7. Click the Configure Adaptive Search task link.
8. On the Configure Adaptive Search page, select the **Configure UI**tab.
9. Enter either HR Help Desk Request or Internal Service Request in the **Find Objects**field.
10. Click the **Search** icon.
11. In the **Enable for Group By** column, select the fields you want to enable for grouping.
12. Click **Save and Close**.
13. Navigate to the Configure Adaptive Search task.
14. Click the **Parameters** tab.
15. If the Enable Group By parameter Current Value is N, then click **Edit** and change it to Y.

16. If you've made a change, click **Save** then navigate back to the Configure Adaptive Search task.
17. Click the **Setup** tab.
18. From the Actions menu, select **Full Publish**.
19. Click **Publish** on the message.
20. Select the **Monitor** tab.
21. Click **Start Process** to start the Elastic Search indexing.

    > **Note:** This job will continue to run in the background. It is initially very common for there to be errors. Start the process again until you see a Wait status. As long as the job is running, you won't see REST API errors from this search in Help Desk.

22. Verify that you see the job in WAIT status.

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.

Can I create a reminder notification for requests still waiting for a response?

Here's a sample object workflow trigger condition that sends a reminder to an agent after a request is in Waiting status for over seven days.

How to create the notification:

1. Create a new field called "AgentResponseDateTime_c" to capture the date and time when an agent responds to a request.
2. Create a new field called "WaitingReminderSent_c" to track whether or not a waiting reminder has been sent.
3. Create a new field called "EmployeeResponseReceived_c" to track whether the employee responded with follow-up comments after an agent has responded to the request.
4. Write a Groovy script for the status field with the following actions:

a. Capture the date and time in the "AgentResponseDateTime_c" field when an agent responds to a request.
b. Reset the "WaitingReminderSent_c" field to "N" as the timer for reminders is reset to zero when an agent responds to a request.
c. If the employee has responded with follow-up comments, set the "EmployeeResponseReceived_c" field to "Y".

5. Create an Object Workflow to trigger waiting reminders.

   Object Workflow Trigger Condition:

   - Object: HR Help Desk Request
   - Name: RequestWaiting1stReminderEmail
   - This sends first reminder email to requester when a request status is in waiting for over 7 days.
   - Active: Yes
   - Event Point: When a record is updated
   - Condition:

```
/" Added By: Your Name, Date
Purpose: Send reminder email when request status is set to Waiting */
if (isAttributeChanged('StatusCd') && StatusCd == 'ORA_SVC_HRHD_WAITlNG' &&
Waiting1stReminderSent_c!= 'Y') {
 return true
}
 else {
 return false
}
```

   Object Workflow Schedule:

   - Groovy Script Name: RequestWaiting1stReminderEmail
   - Execution Schedule: 1 Days After AgentResponseDateTime_c

> **Note:** The groovy script should contain the code with reminder email content and send reminder email when employee hasn't put any follow-up notes and the status is Waiting. For example, EmployeeResponseReceived_c != 'Y' && StatusCd == "ORA_SVC_HRHD_WAITING"

How do I enable Audit History for Help Desk?

To enable Audit History for Help Desk do the following:

1. Go to **Setup and Maintenance**.
2. Click the **Tasks** icon.
3. Select **Search**.
4. Enter Manage Audit Policies in the search field and click **Search**.
5. Select the **Manage Audit Policies** task.
6. On the **Oracle Fusion Applications** line, change **Audit Level** to **Auditing** , then click **Configure Business Object Attribute**.
7. Select **Service** from the Product drop-down list.
8. Select the items you want to audit.
9. Click **Save**.
10. From the Objects Actions menu, select **Synchronize**.

11. Click **Save and Close**.

A video for this feature is found on *Oracle Video Hub*.

How do I enable mass update for help desk requests?

You can enable the feature to mass update for select fields for help desk requests. Mass updates can be done for either Internal Service Request or HR Help Desk Requests. Here's instructions on how to enable, who can enable, and important considerations for using mass update.

Why use mass update?

Here are some examples where mass update can save time.

1. Reassign all open requests from an employee going on vacation to their backup.
2. Change the status of many requests at once.
3. Use to update commonly used fields.

Important Considerations

- By default, there's a limit of 10 items that can be changed at once. To change this limit up to a value between 1 and 25 (inclusive), change the value of the parameter for Maximum Number of Records that can be Selected in Configure Adaptive Search.
- Mass update shouldn't be used for queue or product. (Even though these possibilities are shown).
- Don't try mass updating help desk requests that span multiple Business Units for the item you're trying to update, it won't work appropriately.
- The amount of time it takes to update the multiple requests is directly related to the number of requests selected.
- Mass update isn't available on smaller resolution devices like mobile phones.

Access Requirements

All Help Desk administrators can enable Mass Update.

Once Mass Update is enabled, the feature is available to all Help Desk agents. This is controlled by the following privileges:

- SVC_VIEW_AGENT_HR_HD_PRIV (HR Help Desk Agent)
- SVC_VIEW_AGENT_ISR_HD_PRIV (Internal Help Desk Agent)

Enable Mass Update

Enabling Mass Update is a one-time set up.

First, set the Configure Adaptive Search parameter Enable Mass Update to Y. To do this:

1. Go to Setup and Maintenance.
2. Click the **Tasks** icon.
3. Enter Configure Adaptive Search in the search field.

4. Click **Search**.
5. Click the link for the Configure Adaptive Search task.
6. Click the **Parameters** tab.
7. Highlight the **Enable Mass Update** line.
8. Click **Edit**.
9. When prompted to continue, click **Yes**.
10. Change the value to **Y**.
11. Click **Save and Close**.

Now, configure the fields that can be mass updated.

1. Click the link for **Configure Adaptive Search**.
2. Click the **Configure UI** tab.
3. In the left panel, select either HR Help Desk Request or Internal Service Request, depending on which you want to configure.
4. Check the Enable for Mass update boxes in all the columns for those fields that you want to make available for mass updates.
5. Click **Save and Close**.

Finally, set a variable in Visual Builder Studio on the Agent's List Page:

1. Navigate to the Agent's List Page (Help Desk Requests card in the Help Desk tab).
2. On the left-hand panel, expand the following options:
3. Click **elastic-search-sr-list**.
4. In the **Variables** tab, select **enableMassUpdate**.
5. On the right panel, change the Value to **true**.
6. Preview your changes before publishing.

What are some common reasons why my Help Desk requests aren't getting assigned?

If your requests aren't getting assigned to agents or queues, here are a couple common issues:

- Make sure Adaptive Search (Elastic Search) is running.
- Make sure your rules reflect an effective start date.

Related Topics

- How do I get started with Oracle MR - HR Help Desk?

Where can I get more information about routing and queues for help desk?

This presentation given by our Technical Support team reviews the different methods of assigning Help Desk requests to Help Desk agents and addresses best practices and logistics for configuring your Help Desk in the Redwood Experience.

Find the presentation here: *Routing and Queuing for HR Help Desk*

Can I change what predefined Help Desk roles can do?

You can't change ready-to-use (or what's sometimes called "out-of-the-box") job roles. You can, however, make copy of a role and edit it to meet your business objectives.

For example, let's say you want to make your existing agents have read-only access to certain types of requests.

If the privilege of Edit Service Request came from a ready-to-use employee role, create a new role and remove the privilege of Edit Service Request. Then and attach your new role to your user and remove the old one.

Make sure you run the ESS jobs after making changes. Go to Navigator > Tools >Scheduled Processes and run the following:

1. Send Pending LDAP request
2. Retrieve latest LDAP changes
3. Import User and Role Application Security Data
4. Synchronize Person Records
5. Sign out and sign in.

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

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

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

Can I copy a Help Desk request and keep the attachment?

Copying the attachment when you duplicate a request saves you from downloading and reattaching attachments. You must have the correct privileges do this. If you can't duplicate a request and keep the attachment, contact your administrator for the correct privilege.

To copy attachments when copying requests, agents should be assigned the privileges that allow viewing and adding attachments:

- View Attachment (SVC_VIEW_ATTACHMENT)
- Add Attachment (SVC_ADD_ATTACHMENT)

Note: The copy attachment when copying help desk requests feature is only available with Help Desk in the Redwood experience.

Can I notify all members of a queue?

You can set up Help Desk to notify all members of a queue to receive of notifications. With this feature, everyone in a queue can be notified that a new issue was routed to them. Here's how you enable the feature for queue member notifications.

To enable this feature:

> **Note:** If your queues have many agents, defining a notification that's sent to all members, this feature might have a slight impact on performance of the delivery of the notification. Oracle doesn't recommend using the notification recipient option for queues with a large membership.

1. Navigate to Setup and Maintenance.
2. Click the **Tasks** icon to expand the options and click **Search**.
3. Enter the task name Manage Administrator Profile Values and click **Search**.
4. Click the **Manage Administrator Profile Values** task.
5. Search for the appropriate **Profile Option Code**:
    - For HR Help Desk: ORA_ENABLE_QUEUE_MEMBER_HELPDESK_NOTIFICATIONS
    - For Internal Service Request (ISR) Help Desk: ORA_ENABLE_QUEUE_MEMBER_INTERNAL_SR_NOTIFICATIONS
6. On the **Site Level** line, update the value to **Yes**.
7. Click **Save and Close**.
8. Click **Done**.

Once you've enabled the appropriate profile option, you need to define and publish a notification trigger through a sandbox in Application Composer.

For detailed instructions, see: *How do I define notification triggers?*

Now, after enabling the feature and defining the notification trigger:

1. From the Navigator menu, expand **Tools** and click **Notification Preference Manager**.
2. From the **Object** drop-down list, select either **HR Help Desk Request** or **Internal Service Request** as appropriate.
3. Click the **Add** icon.
4. Complete all the required fields.
    - **Enabled**: Yes
    - **OverrideFlag**: Yes
    - **Triggering Event**: The new notification trigger that you'd like to override to send to the entire queue's resources.
    - **Notification Name and Description** should give other administrators the understanding of what it does.
5. For **Recipients**, click the **Edit** icon to edit the recipients.
6. To send notifications to all members of the queue, select the check box option for **Bell Notifications** or **Email Notifications** as desired for the line **All Queue Members**.
7. Add the **New SmartText** to give an appropriate message.
8. Click **Publish**.
9. Click **Save**.

Related Topics

Can I recall an email that was sent through Object Workflow?

Currently there isn't a way to recall emails sent through Object Workflow.

Can I default the business unit (BU) of the primary contact?

You can set a default value for business unit (BU) for the Help Desk Request Primary Contact on the employee and agent pages using VBS.

To do this, enable the **enableEmployeeDefaultBU** variable under `helpdesk` in VBS.

How do I enable the Group By drop-down for HR Help Desk?

You can add the Group By drop-down to the Help Desk list page and choose what fields to appear in the drop-down. Here's how:

1. Navigate to Setup and Maintenance
    - Setup: Service
2. Search for and open the task Configure Adaptive Search.
3. Select **Configure UI**.
4. Select **HR Help Desk Request** in **Find Objects**.
5. Check the **Enable for Group By** box for the fields you want to appear in the **Group By** drop-down list.
6. Click **Save and Close**.

> **Note:** Make sure **Enable Group By** is enabled in **Parameters**. To do this, while you're in the Configure Adaptive Search task, click **Parameters** . Make sure the **Current Value** for **Enable Group By** is set to **Y**.

How do I set up tags to use with Help Desk requests?

Tags can be set up in Help Desk so that agents can select an existing tag or create a new tag to classify Help Desk requests in whatever way is helpful.

The tags field appears on the Edit Details page for any agent UI user with appropriate permissions.

Tags also appears as a link on the Help Desk request page. When clicked, the link opens the tags field at the top of the page and allows tags to be edited or deleted from the request.

The Manage Tags (SVC_MANAGE_TAGS) privilege is required to use tags.

By default, this privilege is provided for the following duty roles:

- HR Service Request Administration
- Internal Service Request Administration

Users with the Manage Tags privilege will automatically see the Tags field on the Agent UI. If you want individual agents to view, add, and delete tags, you can create a custom role to include this privilege.

Here's a video showing how to configure Help Desk so that agents can associate a tag or tags to a help desk request.

Note: This is for release 24A. More tag-related functionality is expected in future releases.

Video Hub: *Tagging Help Desk Requests*

How long can a help desk request remain in the application?

There's no limit for holding a request in the application. If you've not set any of the profile options or purge, the request will remain in the application.

For more information about Help Desk profile options, see: *What are the profile options for Help Desk?*

How do I configure live chat for Help Desk?

For immediate help, employees can use the chat widget from the My Help page to request a live chat with an agent. In the chat window, agents confirm the employee's identity and can view their request history. When done chatting, the chat transcript is captured and shown on the employee interactions page. Here's how to set up live chat for Help Desk:

An employee starts the chat, by clicking the chat icon and filling in the relevant information.

For an agent to have a chat routed to them, they must set themselves as available to accept a chat. When the dialog box appears, the agent must accept the chat.

Note: This feature includes a component that's only available through controlled availability. Please open an SR with Technical Support to enable this feature.

Access Requirements

For Employees to have ability to chat with an agent, they should have the Help Desk User role.

Chat Agents must be given the privilege Use Chat Agent Features, which is given to the duty role Chat Agent by default.

Administrators who are first configuring Chat should have the Service Request Administrator job role (at least temporarily while setting up the chat) and either the HR Service Request Administration or Internal Service Request Administration role or a similar role having the Setup Service privilege.

How to Enable Chat

Before you begin, be sure that your Chat Agents have the appropriate permissions as outlined in the Access Requirements Section below.

There are several steps to configure chat:

1. Enter the promotional code.
2. Enable the ability to chat.
3. Configure the queuing and routing rules.
4. Configure chat in visual builder.
5. Validate screen pop rules.

Enter Promotion Code

To enable Chat, you'll need to request a promotion code for Digital Engagement Channels Service. Open a Service Request with Technical Support to work with one of our Chat specialists.

- Product = Engage
- Summary = Requesting access for chat for Help Desk

1. Go to **Navigator > My Enterprise > Enterprise**.
2. Click **Manage Promotion Codes**.
3. Click **Enter Promotion Code**.
4. Enter the **promo code** provided by Oracle.
5. Click **Save and Close**.
6. The list should now show that **Digital Engagement Channels Service Promotion Code** is included in the controlled availability offerings.
7. Click **Done**.

Enable the Ability to Chat

1. Navigate to Setup and Maintenance.
    - Setup: **Service** (Not Help Desk)
2. Click **Change Feature Opt-In**.
3. Select the **Communication Channels** row.
4. In the Features column, click the **Edit** icon.
5. Click the check boxes to enable both **Digital Engagement Channels Service** and **Chat**.
6. Click **Done**.
7. Click **Done**.
8. Now, select Help Desk from the **Setup** drop-down list.
9. Click the **Tasks** icon.

10. Click **Search**.
11. Search for **Manage Service Assignment Objects**.
12. Select the HR Help Desk Queue row with the code: ORA_HRHD_Queue_Candidate_Object
13. In the Manage Service Assignment Objects region, click the **Attributes** tab.
14. Look for **Stripe Code (StripeCd)**. If it doesn't exist, create it.
15. Click **Save and Close**. If you've created the Stripe Code, click **Save and Publish**.
16. On the task **Search** page, enter **Manage Administrator Profile Values** in the search field and click **Search**.
17. Click the link to open the Manage Administrator Profile Values task.
18. Search for each profile code in the table below and set the value for each (if not already done).

Relevant Administrator Profile Values

Profile Code	Value
ORA_SVC_MCA_GLOBAL_PRESENCE_ENABLED	Yes
SVC_HD_SHOW_AVAILABILITY	N
SVC_ENABLE_OMNI	Yes
SVC_ENABLE_CHAT	Yes
SVC_CHAT_INLAYS_ACCESS_ENABLED	Yes
ORA_SVC_ENABLE_DEC_WITH_LIVEWINDOW	No
SVC_CHAT_ANONYMOUS_ACCESS_ENABLED	No*

Note: *Set Anonymous Access to No if chat is only used for Help Desk. If it's being used for other applications, such as Service Center, then use the default for whatever value is required for the other applications.

Configure the Queuing and Routing Rules

Create a new chat queue:

1. On the navigator, go to **Home > Help Desk > HR Help Desk Queues**.
2. Click **Create Queue** and complete the required fields.
   a. Check the box to make Activation **Enabled**.
   b. Click the **Automatic (Push)** option for Distribution.
3. Click **Save and Continue**.
4. Click the Resources tab and add the desired agents as resources on the queue.
5. Click **Save and Close**.
6. On the HR Queues page, click the row containing the queue you just created.
7. Click the **Capacities** button.
8. Set the chat capacity for each agent resource to the desired value.
9. Click **Save and Close**.

Create the assignment rules:

1. Navigate to Setup and Maintenance.
2. Click the **Tasks** icon.
3. Click **Search**.
4. Search for **Manage Service Assignment Rules**.
5. Select the Rule Set Category as appropriate:
   a. For HRHD: HR Help Desk Generic Queuing Rules
   b. For ISR: Internal Generic Queuing Rules
6. Click the **Add** icon to create a new rule set.
7. In the Rules section, click the **Add** icon to create a new rule for the rule set.
8. Complete the **Rule Name**, **Description**, and **Effective Date**.
9. Click the **Add** icon to add one or more conditions for the assignment. For example:
   - Object = Any
   - Attribute = Stripe Code
   - Operator = Equals
   - Value = ORA_SVC_HRHD (for HRHD) or ORA_SVC_ISR (for ISR)
10. In the Assign Help Desk Queue region, click the **Add** icon.
11. Select and add the queues to be assigned to the rule.
12. Click **Apply**.
13. Click **Done**.
14. When you've completed all rule assignments, click **Save and Close**.
15. Click **Save and Publish.**
16. Click **Done**.

Configure Chat in Visual Builder Studio (VBS)

To enable Chat and make the chat icon appear in the MyHelp page:

1. From Navigator, go to **Configuration > Visual Builder**.
2. In VBS, navigate to **Extensibility > App UIs > helpdesk**.
3. Click the **Variables** tab.
4. Click the **chatSetup** variable and replace the JSON to set the **enableChat** variable.

   Here's an example that you can use. (Substitute TBD for the queue values in your environment):

   ```
   { "enableChat": true, "position": { "bottom": "10px", "right": "10px" }, "launchForm": [ { "name":
   "serviceRequestNumber", "required": false, "relaunchValue": "keep"} , { "name": "subject", "required":
   false, "relaunchValue": "clear" } , { "name": "stripeCode", "required": true, "relaunchValue":
   "default", "options": [ { "value": "ORA_SVC_HRHD", "text": "Personnel/Personal Issue (HRHD)" },
   { "value": "ORA_SVC_ISR", "text": "Business Issue (ISR)"} ] }, {"name": "queueId", "required": true,
   "relaunchValue": "clear", "options": [ { "value": "TBD", "text": "Benefits" }, { "value": "TBD",
   "text": "Complaint/Grievance" }, { "value": "TBD", "text": "Payroll" } ] } ], "wcfsCdnPath": "https://
   ee.channels.ocs.oraclecloud.com/wcfs/23.10.0/wcfs-sdk.js"}
   ```

   When calling chat, the following is set based on which type of Help Desk is enabled:

   - ORA_HRHD - App Classification
   - Stripe code: ORA_SVC_HRHD (for HR Help Desk) or ORA_SVC_ISR (for all other Help Desks)

Set Up Screen Pop Rules

Rules must be set up so that the screen pop will act appropriately based on the application and types of data known. For example, if an HR Help Desk request number is provided, you might want to be taken directly to the request, while if you know the person but not the exact help desk request, then you'll likely want to be taken to the Employee Summary page.

1. Navigate to Setup and Maintenance.
2. Click the **Tasks** icon.
3. Click **Search**.
4. Search for **Manage Screen Pop Configuration**.
5. Create a Default Rule Set (if one doesn't already exist).
    a. **Application Classification** = Human Resources Help Desk. (This is whether you're using Internal Help Desk or HR Help Desk.)
    b. **Interface Type** of **Redwood**.
6. For the Rules, you'll confirm that the following tokens are mapped to the Page to Pop, by default:
    - HR Help Desk Request Number > VB Edit HR Help Desk Request
    - Internal Help Desk Request Number > VB Edit Internal Help Desk Request
    - Person Id > VB Edit Employee
    - Contact Id > VB Edit Employee

How do I implement chatbot for Help Desk?

If you're using Help Desk in the Redwood experience, you can implement the Help Desk Assistant chatbot to streamline knowledge searches and new help desk requests. You can also update and close requests from the chat window.

Here are the steps to enable the Help Desk Assistant chatbot.

1. Navigate to **ODA console > Development > Skills > Helpdesk**.
2. Select the **Extend** option.
3. The two Knowledge Article intents disabled as a default. Only enable **Search Knowledge Article**.

> **Note:**
>
> - 'Search Knowledge Articles' intent uses:
>   - "versionedContentApi": "https://host:port/km/api/latest"
>   - "versionedSearchApi": "https://host:port/srt/api/latest"
> - Search terms must be double quoted which will match against "Title", "Article Code", "Description" (also known as content)

4. Export Intents.
5. Change those utterances with "hardcoded search term" that aren't relevant to your site query intent.
6. Replace them as per configuration data.
7. Navigate to **ODA Console > Development > Skills > Helpdesk > Settings: Configuration: Custom Parameters**.
8. Configure contentTypeMap format for a brief summary to appear in the Chat window.

Note:

- If a type isn't configured, the Bot response renders the Article Title coupling with simple text and **Open Link** button.
- If the answer contains more than 100 lines, only the first three or four lines will render with **See Summary** button followed by a **View Full Article** button.
- The content type in expression should be taken from the Reference Key of the content type. You can find the reference key in Setup and Maintenance in the Manage Knowledge Content Types task.

9. Sanity check your settings:

   da.FARestEndPoint – correct environment pairing both at the skill and DA levels

   HCM Knowledge – either disable/not exposed or delete from FADigitalAssistant whichever is applicable
   da.FAEnableSingleSignOn and da.IsJWTEnabled – unique to respective skills

How do I secure my help desk?

If you need help understanding the options and best practices for securing your help desk, this video presentation is a great place to start.

The *HCM Security for HR Help Desk* presentation reviews different options and best practices for securing your Help Desk.

Also see *How do I get started with Help Desk?* playbook.

How do I configure Slack or Microsoft Teams for Help Desk?

Slack and Teams allows users to participate in threaded conversations using the native web, UI, email, Slack, or Microsoft Teams. This presentation is an in-depth look at the configuration:

The *Configuring Slack or Teams for Help Desk* presentation shows how to set up Slack or Teams to work with Help Desk.

How do I create an Internal Help Desk Request (ISR) card?

When you implement or test a dual-role (HRHD and ISR) agents, you can't see both cards in Help Desk Requests if HR Help Desk is enabled. So, for a single agent to act as both an HR Help Desk agent and an ISR Help Desk agent, you'll need to create a new entry point.

The *How to Create an Internal Help Desk (ISR) Card* video shows how to change the structure and have entry points for the Internal Help Desk for both the Navigator and Help Desk Springboard.

Can I limit actions provided to employees?

To prevent employees from prematurely closing help desk requests, Help Desk administrators can configure whether employees are given the option to close or copy requests.

Here's how to limit what the employee can do:

1. Navigate to **Configuration > Visual Builder**.
2. Go to **Oracle CX HelpDesk UI Extension App > helpdesk > employee > service-request-detail**.
3. Click the **Variables** tab.
4. Click **enableActions**.
5. Choose the appropriate option from the drop-down list.
    - **AllActions**: Both Close and Copy action is displayed
    - **CloseAction**: Only Close action is displayed and Copy action is hidden.
    - **CopyAction**: Only Copy action is displayed and the Close action is hidden.
    - **NoAction**: The entire action bar is hidden.
6. Preview to make certain the change is working as expected.
7. Publish your changes.

Can I change the standard text in an email acknowledgment that's appended to the email template?

If you've enabled an email acknowledgment and created an email template in Application Composer, the appended text can't be completely removed because the Short Text field in the Message Properties is a required. However, it can be shortened.

Here's how you can shorten the appended text:

1. Go to Setup and Maintenance.

2. Search for the task **Manage Messages**.
3. Enter SVC_EMAIL_ACK_FOR_KNOWN_CUST in the Message Name field.
4. Click **Search**.
5. In the search results, highlight the SVC_EMAIL_ACK_FOR_KNOWN_CUST row and click **Edit**.
6. You can make the User Details null and the text in the Short Text field can be updated as desired.

How do I remove a resource user from the resource directory?

You can End Date the resource, by adding a value in **To Date** field.

Using the role Next Gen Human Resource Help Desk Administrator, navigate to the resource directory. Search for the resource name and click **Edit** and **Change** on the **To Date** field.

How do I enable Help Desk to use Intelligent Advisor?

You can integrate Help Desk with Intelligent Advisor to help make decisions on what information agents should collect to update and close help desk requests. Agents access your Intelligent Advisor interviews through Smart Actions in the Action Bar.

The interview can provide step-by-step guidance to help make sure agents are following the defined process, performing all the necessary tasks, and collecting all information before taking the next action like closing the request or escalating it to a case.

Before you can use Intelligent Advisor, you need to create an interview using Oracle Policy Modeler and deploy the interview to your Oracle Intelligent Advisor hub. When you create the interview, make sure you note the URL of the Intelligent Advisor Hub for your environment, and the name of the Interview that you'll be using for existing help desk requests.

> **Note:** This feature requires a license for Oracle Intelligent Advisor. The Oracle Intelligent Advisor administrator and Help Desk Administrator should work together to configure this feature.

Steps to Enable

After you Opt In to the feature, configure the Smart Action to use Intelligent Advisor in Help Desk.

1. On the Navigator, expand the Configuration Section and click **Application Composer**.
2. Go to the Smart Actions Page.
3. If you're not already in a sandbox:
    a. Activate a sandbox by selecting the link in the warning at the start of the page.
    b. Check the Application Composer tool.
    c. Click **Create Sandbox**.

   d. Give the sandbox a name and description
   e. Click **Create and Enter**.
   f. In **Tools**, choose **Application Composer**.
   g. Navigate to the Smear Actions page.
4. Type Assess in the **Search** box and hit enter on your keyboard.
5. Highlight **Assess Help Desk Request**.
6. Click the **Duplicate** icon to create a Smart Action (You need to define it to use the Intelligent Advisor Hub and Interview Name as noted in the introduction of this procedure.
7. In the **UI-Based Action Details** section of the Smart Action Edit page, click the **Edit** icon.
8. Click the **Edit** icon for **Deployment Name** and enter the name of the Intelligent Advisor interview to be run by this Smart Action.

   No full path is required.
9. Click the **Edit** icon for `opaSiteURL` and enter the Intelligent Advisor URL for your environment.

   No URL paths following the .com is required.
10. Click **Continue**.
11. Click **Submit**.
12. Follow all the steps above for each of the interviews you want to run from the Help Desk action bar.
13. Publish the sandbox.

How do I integrate and assign HCM journeys from Help Desk?

You can connect HCM Journeys to Help Desk so an agent can assign Journeys to the primary contact on a help desk request. This allows employees to use the guidance of a Journey. Employees can also browse or search popular Journey resources and start a journey that helps resolve an issue (if configured).

Enable Journeys

For Journeys to be enabled you'll need to:

- Categorize Journeys to be displayed in the Help Desk (optional)
- Enable Journeys to be displayed on the My Help page.
- Add the Journey category using Visual Builder (optional)

Enable Journeys to be Displayed on the Employee My Help Page and Categorize

1. Navigate to the My Help page in Help Desk.
2. Click your photo icon and go to options. Choose **Edit Pages**.
3. The page will open for **Oracle CX HelpDesk UI Extension App > helpdesk > employee**.
4. In the Designer tab, click the default rule.
5. Change the name of the rule to Layout with Journeys.
6. In the Section region, click the add icon and add Assignable Journeys.

7. Click the Variables tab.
8. In the Constraints section, click **IncludeJourneyInMyHelpPage** and change the default value to true. This enables Journeys to be viewed on the My Help page.
9. If you want Journeys to be considered when users are searching through the search bar, enable the constant **IncludeJourneyInMyHelpSearch** by setting it to true.
10. To filter Journeys so the Journeys section in My Help is limited to a select category or categories, navigate to the employee page (**Oracle CX HelpDesk UI Extension App > helpdesk > employee**) and use the constant **JourneyCategoriesToDisplayForEmp** with a list of comma separated values that match exactly the desired categories associated with the journeys to be included.

To Allow Agents to Assign a Journey in Smart Actions

1. Navigate to your existing sandbox or create a new sandbox session.

   To create a sandbox:
   a. In the Navigator, select Sandboxes.
   b. Click **Create Sandbox**, with the following values:
      - Name = HelpDesk (Note: it's best practice to avoid using names with spaces)
      - Publishable = Yes
   c. Select the tool **Application Composer**.
   d. Click **Create** .
2. Navigate to the Application Composer by selecting it from the Tools dropdown list
3. Click **Smart Actions** in the Common Setup on the left-hand panel.
4. Type Journey in the search bar and hit Enter on your keyboard.
5. In the Enabled column, change the value to **Yes**.
6. In the sandbox name dropdown, select **Publish**.
7. If prompted, click **Continue**.
8. Click **Done** when publishing is completed.

Note: Journeys are only seen on the My Help page by employees if the journeys can be assigned to the employee. Employees can assign a Journey to themselves by clicking on the person-plus icon. Agents can assign a Journey by typing Assign Journey in the Action Bar and choosing the Journey to be assigned.

For more information about integrating Journeys, see the *Help Desk Journeys Integration (WN 24B)* video on Oracle Video Hub. The video shows the different ways that Help Desk can integrate with Journeys and how to set up the configuration for both the employee UI and for agents.

Access Requirements

To assign journeys to workers, Help Desk agents need the following duty role assigned to them:

- Manage Journey By HR (ORA_PER_MANAGE_JOURNEY_BY_HR)

To view the global journey templates configured by the administrator, and assign the global journey template to themselves, employee users need the following functional privileges assigned to them:

- Explore Journeys (PER_EXPLORE_JOURNEYS)
- View Global Journeys (PER_VIEW_GLOBAL_JOURNEYS)

To view and act on journeys assigned to them, employee users need the following duty role assigned to them:

- Access Journey by Worker (ORA_PER_ACCESS_JOURNEY_BY_WORKER)

Can I define which values I want to be copied when copying a help desk request?

Yes, you can change what attributes are carried over when a help desk request is copied. Defining the values you want copied is helpful when you want to remove Queue or AssignTo so the request is routed as a new help desk request. It can also be used to set a value for a calculated field or any other changes that can be done through JavaScript.

Anyone with access to the Visual Builder Studio development workspace for Help Desk can make these changes.

To learn more about extending your application using Visual Builder, visit *Oracle Help Center* > *your apps service area of interest* > Books > Configuration and Extension.

> **Note:** Be cognizant of removing or changing fields that are required or have limited values within the APIs or database rules, validation rules.

For a how-to video presentation showing how to configure this feature, see *Removing Attributes from the Copy Function* on Videohub.

To Change What Values are Copied:

1. From the Navigator, go to Configuration > Visual Builder.
2. Navigate to Oracle CX HelpDesk UI Extension App > helpdesk > agent > service-request-copy-start.
3. Click the **Variables** tab.
4. Click **enableBeforeUpdate**.
5. Set the value **enableBeforeUpdate** to true.
6. Click the **JavaScript** tab.
7. Make the changes by adding a new **PageModule** function that returns the payload. For example, you can define something like this:

```
var PageModule = function PageModule(){};

PageModule.prototype.removeQueue = function(payload){

delete payload.QueueId;

delete payload.AssignTo;

return payload;

}

return PageModule;
```

8. Click the **Action Chains** tab.
9. Create an Action Chain.

a. Create a new action chain and provide a descriptive name such as changeCopyPayload.
b. Click the Diagram tab.
c. Add Call Function and give it the name of your function from the JavaScript (like, removeQueue).
    i. In Input Parameters, click **Payload**.
    ii. Map the payload to the variable copyRequestPayload.
    iii. Click **Save**.
d. Next add the action **Assign Variables**.
    i. Give the step an ID or Name.
    ii. Click Payload.
    iii. Select the Target of copyRequestPayload, and set the expression to $chain.results.changeCopyPayload or whatever name you chose for the Action Chain.
    iv. Click Save.
e. Add a **Return** action.
    i. Give the step an ID or Name.
    ii. Set **Outcome** to success.
f. Click the **Event Listeners** tab.
    i. Create a **Custom Event Listener** for **beforeCopy**.
    ii. Add the Action Chain.
    iii. Go to the Action Chain.

10. Click the **Event Listeners** tab.
    a. Create a **Custom Event Listener** for **beforeCopy**.
    b. Add the Action Chain.
    c. Go to the Action Chain.
11. **Preview** to make sure the change works as expected.
12. **Publish** your changes.

How do I configure personalized signatures for help desk agents?

Your agents can create a personal rich text signature that's automatically inserted at the end of a help desk request email message. Agents can manage their own signatures and add images such as a company logo.

Agents who've used SmartText in the past as a way to define their signature might see a performance improvement using this method to create their signature.

You must be an administrator to configure the profile option that enables agents to create personal signatures.

Agents need the Manage Signature (SVC_MANAGE_SIGNATURE_PRIV) privilege to use this feature.

This privilege is included in the standard Job Roles:

- Next Gen Human Resources Help Desk Agent
- Next Gen Human Resources Help Desk Manager
- Next Gen Human Resources Help Desk Administrator
- Internal Help Desk Agent

- Internal Help Desk Manager
- Internal Help Desk Administrator

This privilege has also been granted to the following Duty Roles:

- HR Service Request Administration
- HR Service Request Analysis
- HR Service Request Management
- Internal Service Request Administration
- Internal Service Request Analysis
- Internal Service Request Management

Use the following steps to configure this feature:

You can also see a demo of how to configure this feature here: *Create a Personal Signature*

1. Go to **Setup and Maintenance**.
2. Click the **Task** icon.
3. Click **Search**.
4. Search for the Task **Manage Global Search Profile Options.**
5. Search for the profile option code for the type of Help Desk that you're using:
    - ORA_SVC_HRHD_ENABLE_PERSONAL_SIGNATURE for the HR Help Desk
    - ORA_SVC_ISR_ENABLE_PERSONAL_SIGNATURE for the Internal Service Request Help Desk
6. Set the site level profile value to **Yes.**
7. Click **Save and Close**.
8. Click **Done**.
9. You need to sign out and sign in again for this change to take effect.

The agent's signature will be included in the body of the email. You don't need to include more signatures in the email template.

How do I manage my personal signature for Help Desk?

You can add or change your personalized email message signature including adding a company logo.

If you've used SmartText in the past as a way to define your signature, you might see a performance improvement using this method to create your signature.

You can see a demo of how to manage your signature on Videohub. (For managing signatures, start at the 1:35 minute mark): *Create a Personal Signature*

Here's how you can create and manage your personalized signature:

1. Navigate to the Help Desk menu on your home page and click the **My Signature** Quick Action.
2. The signature name is defaulted to **My Signature**.
3. Enter a name for your signature (limited to 50 characters with no special characters)
4. Enter the text for your signature line.
5. Use the icons below to format text, add links, or insert images.

> **Note:** There's a size limit to your signature. If you experience issues with sending messages with images, try reducing the size of your image.

6. Click **Save and Close**.
7. Now when you're signed in as a help desk agent, your personalized signature is displayed in messages.

How do I control user types displayed in the contact picker?

You can configure the types of HCM contacts that are visible in the contact picker.

Here's how you set the profile options to control visibility in the contact picker:

1. Navigate to Setup and Maintenance.
2. Click the **Tasks** icon.
3. Click the **Search** link.
4. Enter Manage Administrator Profile Values in the **Search** field.
5. Click **Search**.
6. Click the **Manage Administrator Profile Values** link.
7. In the **Search** field, enter the profile option code from the following table.
8. Click **Search**.

Profile Options to Control What's Displayed in Contact Picker

Profile Option Name	Profile Option Value	Description
ORA_HELPDESK_CONTACT_PRIMARY_ASSIGNMENT	Primary All	Determines if all assignments or only the primary assignment is displayed in the search results.
ORA_HELPDESK_CONTACT_TERMINATED_EMPLOYEES	Active All	Determines if both active and terminated employees or only active employees are displayed in the search results.
ORA_HELPDESK_CONTACT_ASSIGNMENT_TYPE	E, C E, C, P, N	Help Desk supports assignment types of Employee (E), Contingent Worker (C), Non-Worker (N) and Pending Worker (P). This profile option lets you either include all types in the contact picker results or just the Employees and Contingent Workers.

9. Select the appropriate profile value.
10. Click the link for the profile option in the search results.
11. Click **Save and Close**.
12. Click **Done**.

The default value for each profile option is All.