Oracle Fusion Service

Using Case Management

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Using Case Management

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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.

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Thanks for helping us improve our user assistance!

1 About This Guide

Audience and Scope

This guide is intended for users who are involved in creating and managing cases. The activities in this guide are only available if the implementation tasks for Case Management are complete.

Related Guides

To understand more about the information covered in this guide, you can refer to the list of guides in the following table.

Guide	Description
Oracle Fusion Cloud Applications Using Common Features	Provides an overview of the application functionality common across the applications
Oracle Fusion Cloud Customer Experience Creating and Administering Analytics for Sales and Fusion Service	Contains information about supplied reports and analytics, as well as how to create your own reports.
Oracle Fusion Cloud Sales Automation Using Customer Contracts	Contains information to help end users who are charged with creating and managing customer contracts.
Oracle Fusion Cloud Fusion Service Using B2B Service	Contains information to help service representatives use service features and components in Oracle Fusion Service.

What's Case Management?

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

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

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

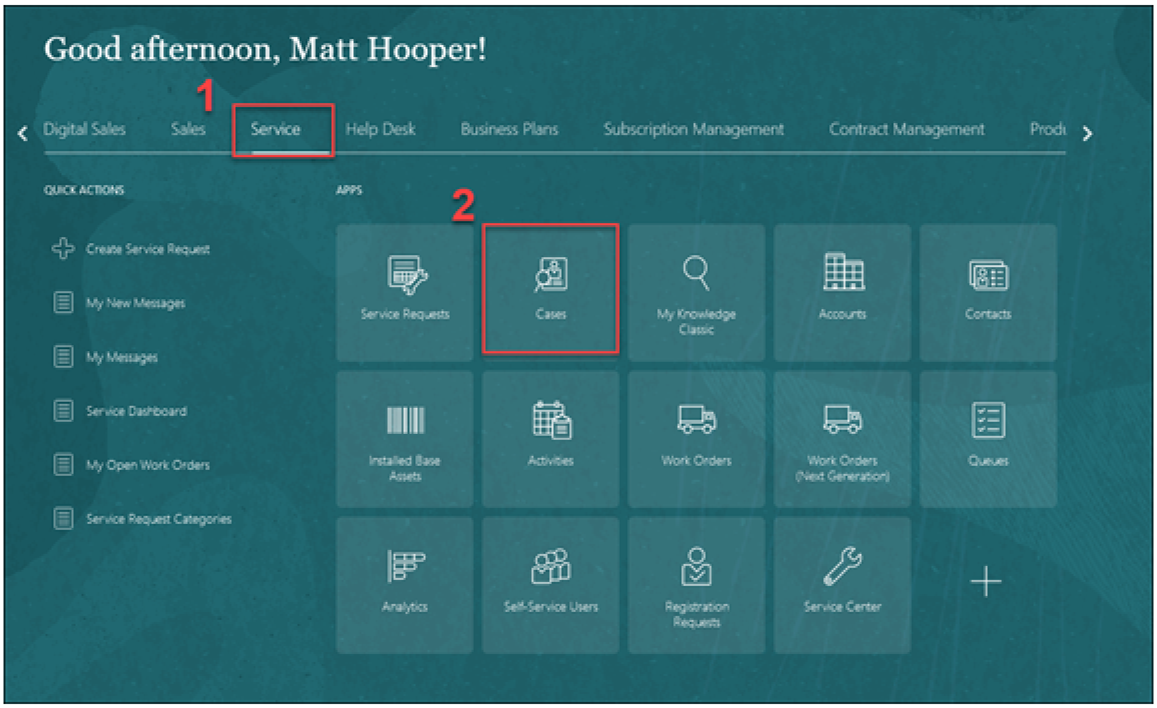
2 The Basics

Navigate to Case Management

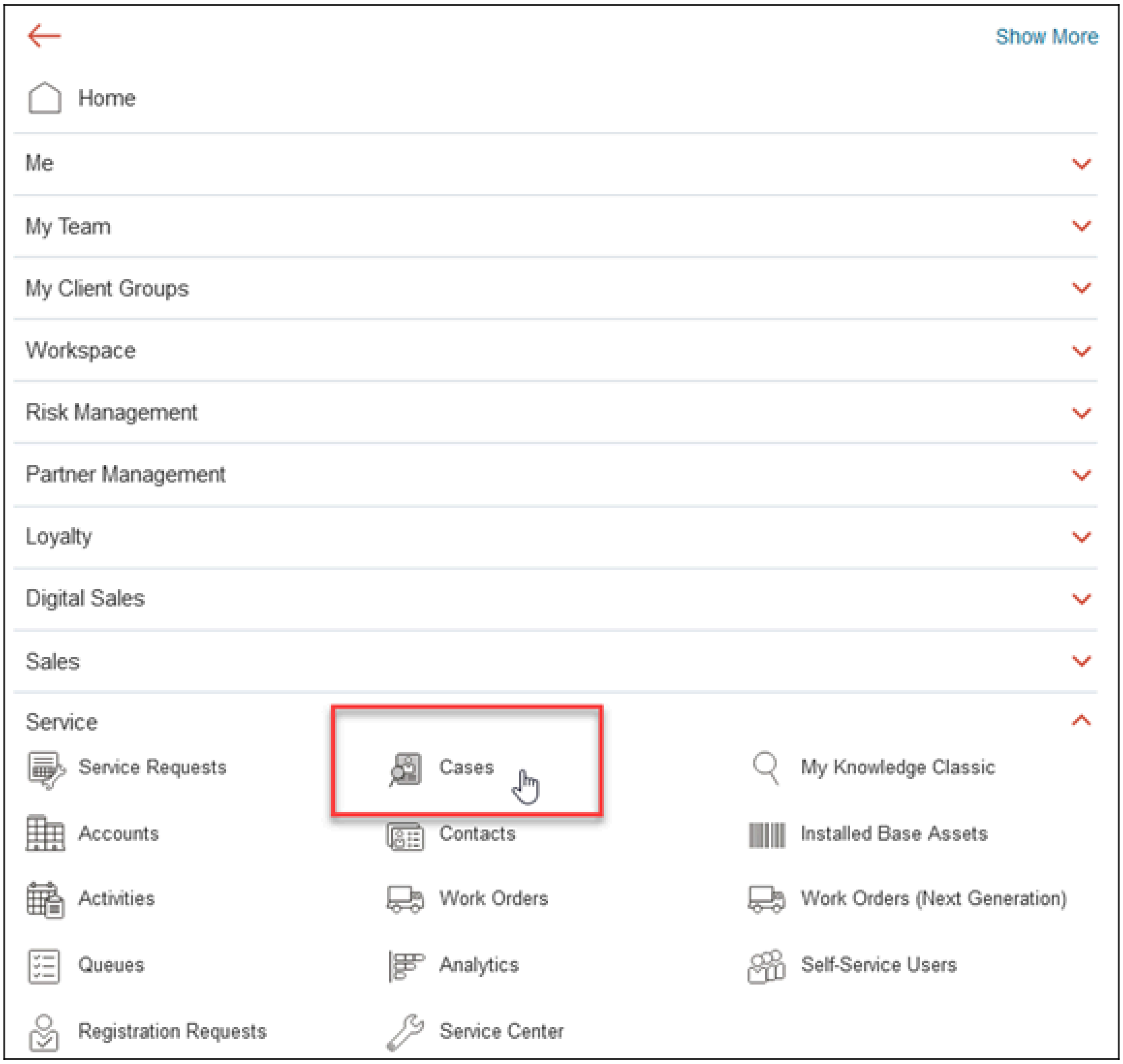
Here's how you navigate to Cases.

1. Navigate to the **Home** page and click the **Service** tab.
2. Click the **Cases** icon.

   If you don't see the **Cases** navigation icon on the Home page, contact your administrator to enable the Case Management for Redwood User Interface opt-in feature.



Alternatively, you can also click **Navigator > Service > Cases**.

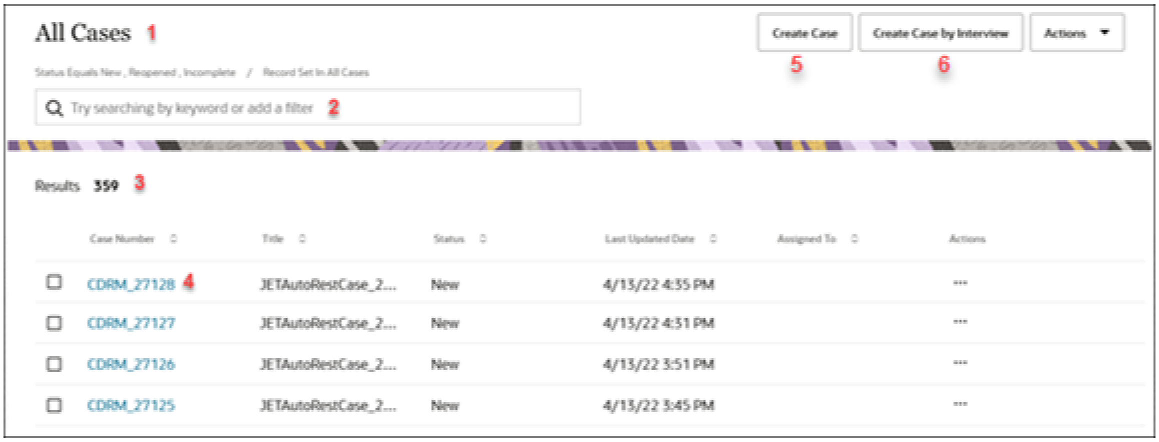


The **Case List** page is displayed.

Overview of the Case List Page

After clicking the **Cases** icon from the **Home** page or the **Navigator**, the **Case List** page is displayed.

Here's an overview of the different sections of the list page.



Callout No/Title	What It Is	What You Can Do
1.	The name of the saved search displayed on the page.	Choose another saved search from the search bar.
2.	Search bar	Click inside the bar and select a saved search from the list. For example, All Cases, My Cases, or Cases Created by Me.
3.	Results	Number of records for the selected saved search.
4.	Case Number	Click to view the case details on the Case Details page.
5.	Create Case	Click to Create a case or you can type Create Case in the Action Bar.
6.	Create Case by Interview	If your company is using this feature, click to create a case using an interview format. This feature must be enabled by your administrator.

Saved Searches

Switch to a Different Saved Search

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

1. Click in the Search bar.

2. Select the new search from the list of saved searches.

   Here's an example of the saved searches available for Cases.

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 that are displayed and the default search order by clicking **Actions** > **Manage Columns**.
4. Click **Apply**.
5. Click **Actions** > **Save**.
6. Enter a name for your saved search in the **Save** dialog box. Saved searches are listed in alphabetic order.
7. Click **Save**.

   Your new saved search is now listed in the Manage Saved Searches page.
8. Click **Done**.

How do I manage Saved Searches?

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

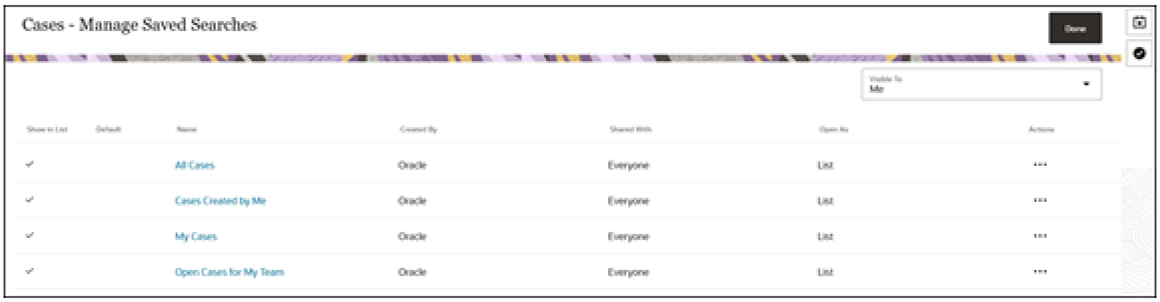
Note:

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

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

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

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

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

Lists

Search Using Keywords

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

Your search matches not only on the title, but also related information such as the contact name or request number. So, your search for Bill, it returns all that include Bill in the case number, title, status, and assigned-to.

Select the Correct Saved Search as Your Starting Point

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

Search Complete Words

1. Finish typing a complete word.
   - If you're searching for an item with multiple words in the name, you can enter any of the words. For example, to search for `disaster relief assistance`, you can enter `disaster`, `relief` or `assistance` in the Search bar.
   - Capitalization is ignored.
2. Press **Enter**.

   The application displays a list of records that contain your search term.

   Here's an example of how you can search for a keyword `disaster`.

Search Partial Words, Exact Phrases, and Use Operators

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

- Use the star (*) symbol to indicate missing characters or partial words. You can use the symbol at the beginning, end, or middle of the search term. For example, in the search bar, enter *12345 to search for a SR with those numbers in it, for example SR0000012345.

  For example, entering `*tion` as your search term to find all items ending with the letters `tion`. Entering the star symbol in the middle of a word such as `Pi*le`, returns Pinnacle, Pineapple, and so on.
- Use the question mark (?) to match exactly one character. You can use this wildcard at the beginning, end, or middle of a word.

  For example, entering `Pri?e` returns Price, Prize, Pride, and so on.
- Put multiple search terms in quotes to search for exact phrases.

  For example, entering `"Pinnacle Corporation"` returns only Pinnacle Corporation, and any other records with those two terms in that specific order.
- Use the OR operator to search on multiple terms.

  For example, entering `Chicago OR Pittsburgh`, finds accounts with those terms in the name. If your application administrator enabled searching on addresses, the results also include all accounts in Chicago or Pittsburgh.
- Use the NOT operator to narrow down your search.

For example, entering `Pinnacle NOT Technologies` when searching for accounts, returns all accounts with Pinnacle in the name, but not Pinnacle Technologies.

When you use NOT followed by two or more words you must enclose the words in double quotes (" "). For example, entering `Pinnacle NOT "Techologies Inc"` when searching for accounts, excludes Pinnacle Technologies Inc.

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

Filter Your List

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

1. On the Case List page, click in the Search bar.

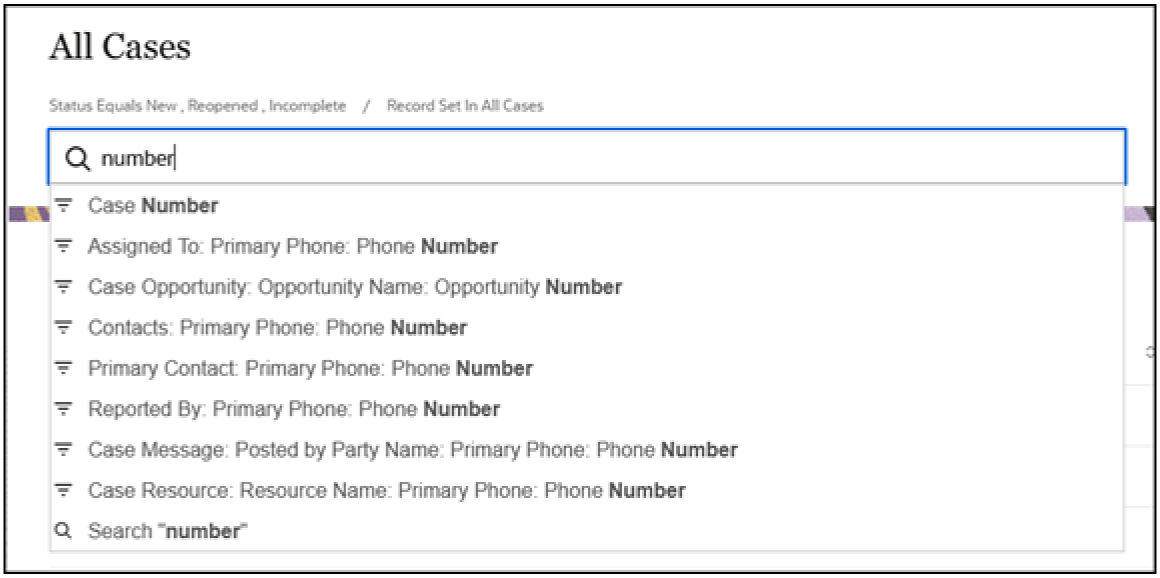
2. To filter the list based on numeric values such as the case number:

    a. Enter **Number** in the Search bar.

        A list of numeric fields is displayed.
    b. Select the appropriate field to filter.
    c. Select the operator.

        You can select the common operators such as **Equals** or **Contains**. You can also click **Show More** to display all operators.
    d. Enter or select the values, and press **Enter**.

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


All Cases
Status Equals New , Reopened , Incomplete / Record Set In All Cases
number
Case Number
Assigned To: Primary Phone: Phone Number
Case Opportunity: Opportunity Name: Opportunity Number
Contacts: Primary Phone: Phone Number
Primary Contact: Primary Phone: Phone Number
Reported By: Primary Phone: Phone Number
Case Message: Posted by Party Name: Primary Phone: Phone Number
Case Resource: Resource Name: Primary Phone: Phone Number
Search "number"


All Cases
Status Equals New , Reopened , Incomplete / Record Set In All Cases
Case Number
Equals
Contains
Show More


All Cases
Status Equals New , Reopened , Incomplete / Record Set In All Cases
Case Number Equals
Cdrm_1 1
Cdrm_1001 1
Cdrm_2001 1
Cdrm_2002 1
Cdrm_2008 1
Cdrm_2009 1

3. To filter the list based on text fields such as priority:

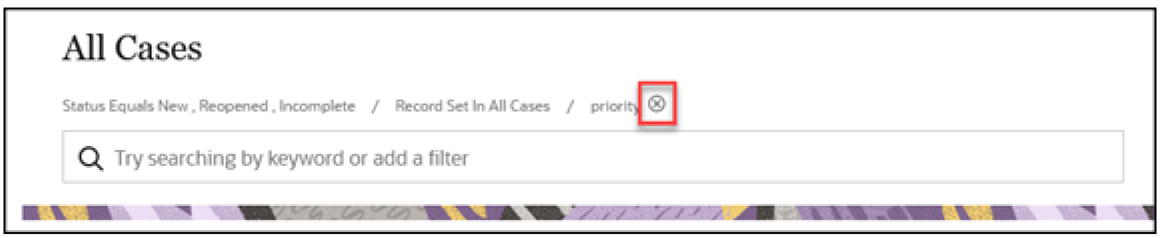
    a. Enter the name of the field in the Search bar.

       A list of filters is displayed.
    b. Select the appropriate field to filter.
    c. Select the operator.

       You can select the common operators such as **Equals** or **Contains**. You can also click **Show More** to display all operators.
    d. Enter or select the values, and press **Enter**.
4. To filter the list based on ranges of numeric and date fields:

    a. Click in the Search bar.
    b. Search for the numeric field or date field and select it from the list.
    c. Select the numeric range or operator from the list, and the operator value.

       You can select the predefined ranges. You can also select the Between operator and specify your own range.
    d. Press **Enter**.
5. To remove a filter, place your cursor over it and click the x icon (highlighted in the following image).



Modify the Display of Fields in the List

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

Here's what you can do:

- Sort the list by one of the columns:

    a. To sort the list by one of the columns, click the **Sort Ascending** or **Sort Descending** arrows next to the column name header.
    b. To restore the default sort order, click the **Actions** drop-down list, and select **Sort by Relevance**.
- Add or remove the columns displayed in the list:

    a. Click the **Actions** and select **Manage Columns**.
    b. In the **Manage Columns** dialog box, select the fields you want to display and deselect the fields to hide. You can search or scroll through the list.
- Change the order of columns displayed in the list:

    a. Click the column header for the column you want to rearrange.

The selected column is highlighted.

b. Drag the column to the new place.

- Adjust the width of the columns:

  a. Click on the column you want to resize.
  b. Hover over the side of the column and drag the column width (from either edges).

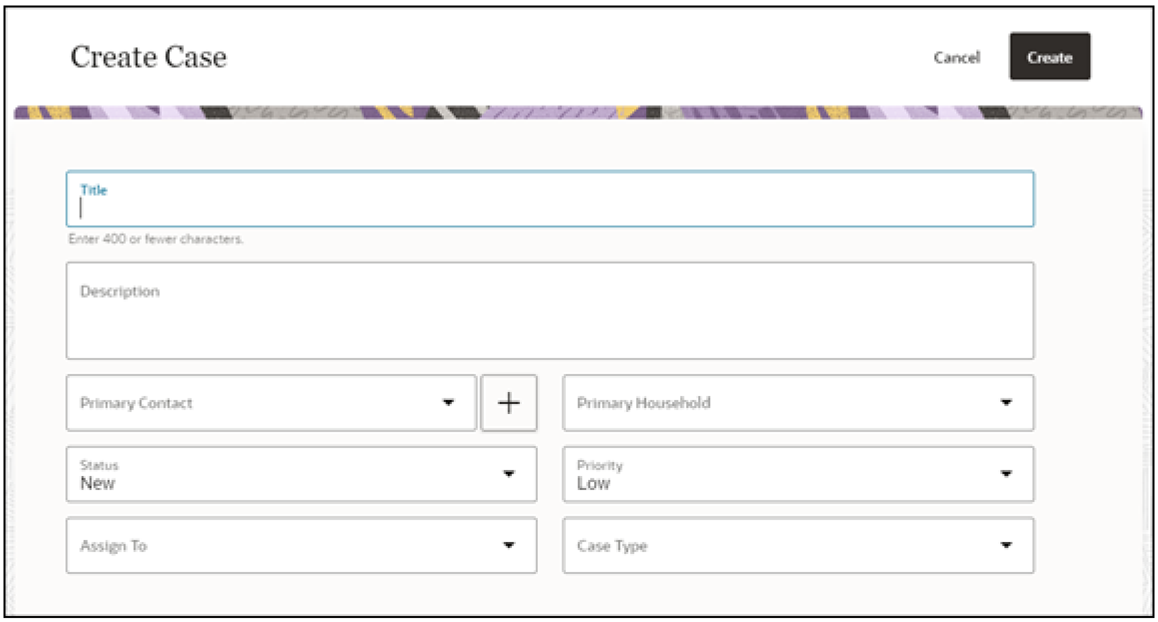
3 Work with Cases

Create or Intake a Case

Depending on your configuration, you can create Cases a number of ways.

Create a Case

1. Click **Create Case** on the Case list page.
2. Complete the appropriate fields on the **Create Case** page. The Title field is required.



3. Click **Create**.

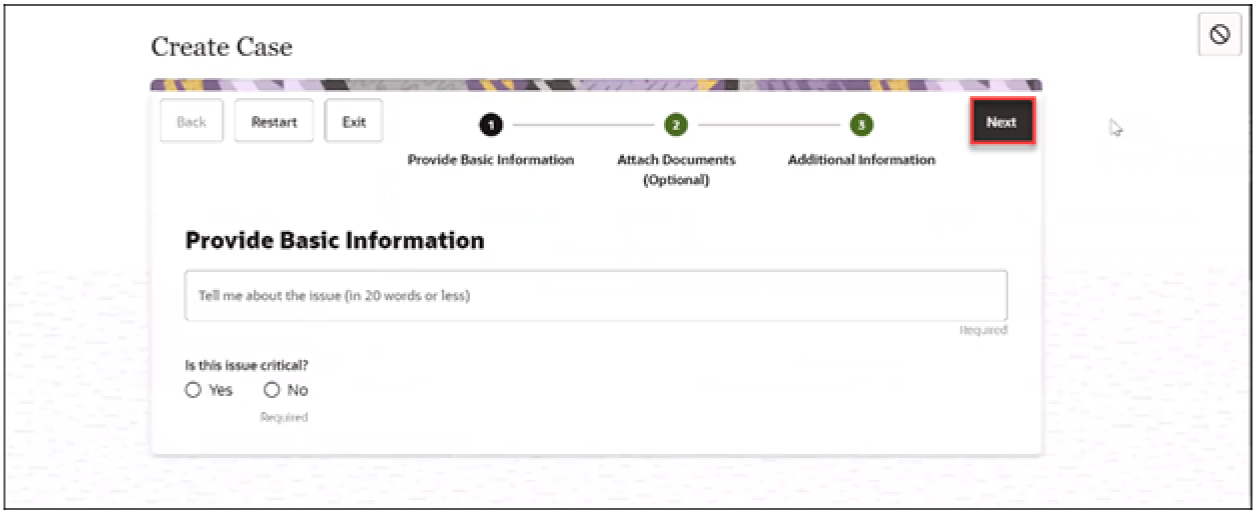
The case is now created and the case is displayed in the **Details** page.

Create a Case by Interview

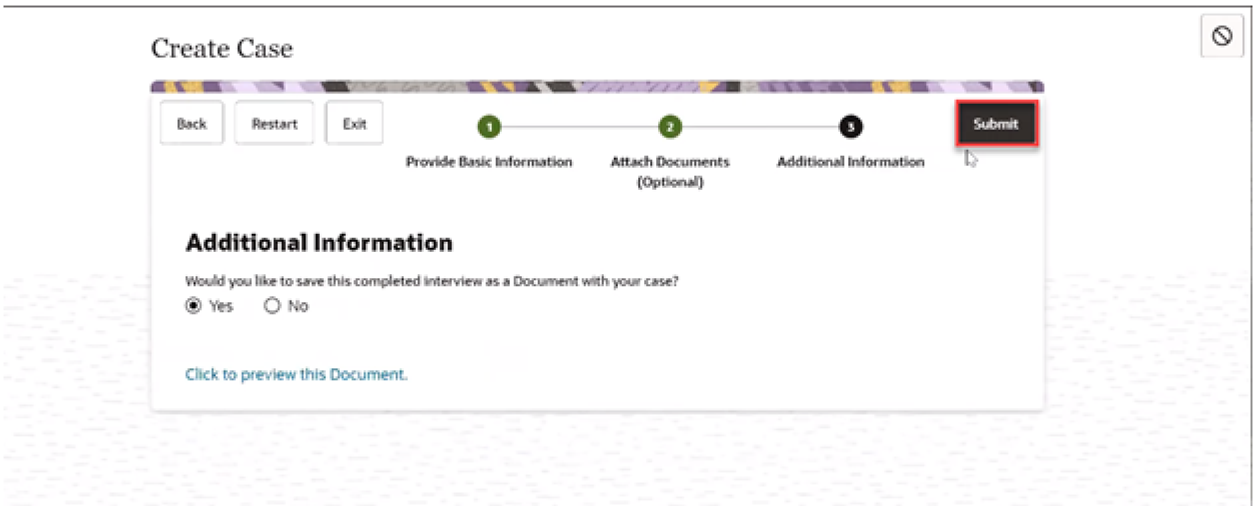
If your organization is using this feature, you can create a case through an interview and walk through a list of predefined questions.

1. Click **Create Case by Interview** on the Case list page.

2. Complete the appropriate fields on each page and click **Next** until you've completed the interview. The following image shows an example of an interview form to create a new case.



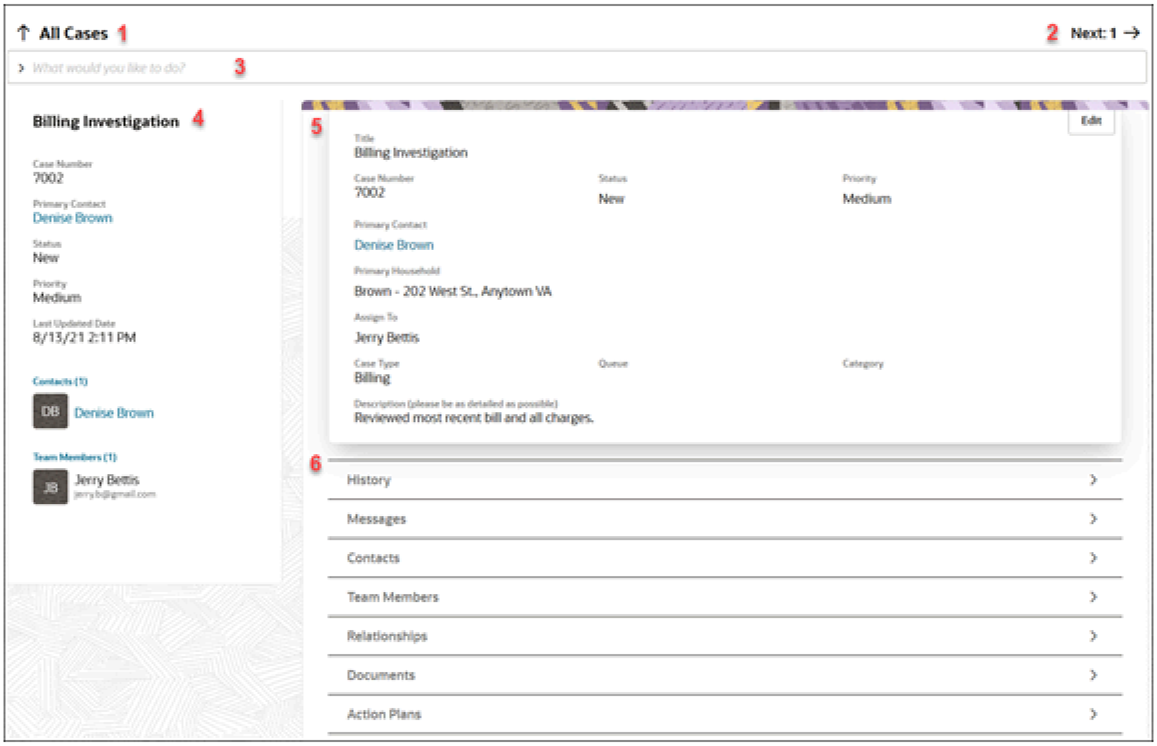
3. Click **Submit** when you're done with the interview.



Overview of the Case Details Page

On the Case List page, if you click a Case Number, the Case Details page is displayed. This page displays detailed information about the selected case.

Here's an overview of the different sections of an individual case record and what you can do.



Callout No	What It Is	What You Can Do
1.	Name of the list	Click to navigate back to the previously viewed case list page.
2.	Next	Click to go to the next record in the case list you viewed most recently.
3.	Action Bar	Enter keywords such as add and update, and select your intended action. To make suggestions, the Action Bar looks for key verbs and names of objects and fields. **Tip:** As a shortcut, instead of clicking inside the bar, you can also use the keyboard shortcut Alt+A (for PC) or Control+A (for Mac) to put focus on the Action Bar and then start typing a keyword.
4.	Summary region	Summary of key fields in the record. Only fields with values get displayed. For example, if you click the Contacts header, the Contact folder of the Case opens; if you click the Name of a Contact, it drills into the Contact Details page.

Callout No	What It Is	What You Can Do
5.	Details region	Shows the details of the case. If you want to edit this information, click **Edit**.
6.	Folders for different business objects	Click the arrow icon to expand the folder to view or edit the related data in each folder.

The Case Details page is organized into different folders for different business objects, which let you view or edit the corresponding data. All folders are collapsed by default, except the **Details** folder.

Here's an overview of these folders:

Folder	Description
History	Read-only information that's automatically updated whenever the case is created, updated, or closed.
Messages	List of messages related to the case. Click **Create Message** to add a message.
Contacts	List of contacts added to the case, either through the Action Bar or the **Primary Contact** field in the **Details** folder. To remove a contact or make a contact a primary, click the **Actions** icon (vertical 3 dots icon).
Households	Household associated with the case. To add a household, click the **Add Household** button in the folder. To remove or make a household primary, use the **Actions** icon on the household row.
Team Members	List of team members added to the case, through the **Assigned To** field in the **Details** folder or by using the **Action Bar**.
Relationships	List of relationships this case has with other cases or service requests. You can add relationships by clicking **Create Relationships**. To update a relationship, click **Update Relationships**. To delete a relationship, click the **More** icon (vertical 3 dots icon) and select **Delete Relationship**.
Documents	Files or URLs added as attachments, through the Action Bar. You can download the attachments by clicking **Download**. To add a document, type Add Document in the Action Bar.
Actions and Plans	Action plan actions or action plans associated to the case. To add an action or action plan, type Add Action or Add Action Plan in the Action Bar. For more information, see the Actions and Plans chapter of this guide.
Tasks	Tasks associated with the case.

Folder	Description
	To add a task, type Create Task in the Action Bar.
Appointments	Appointments associated with the case. To add an appointment, type Create Appointment in the Action Bar.

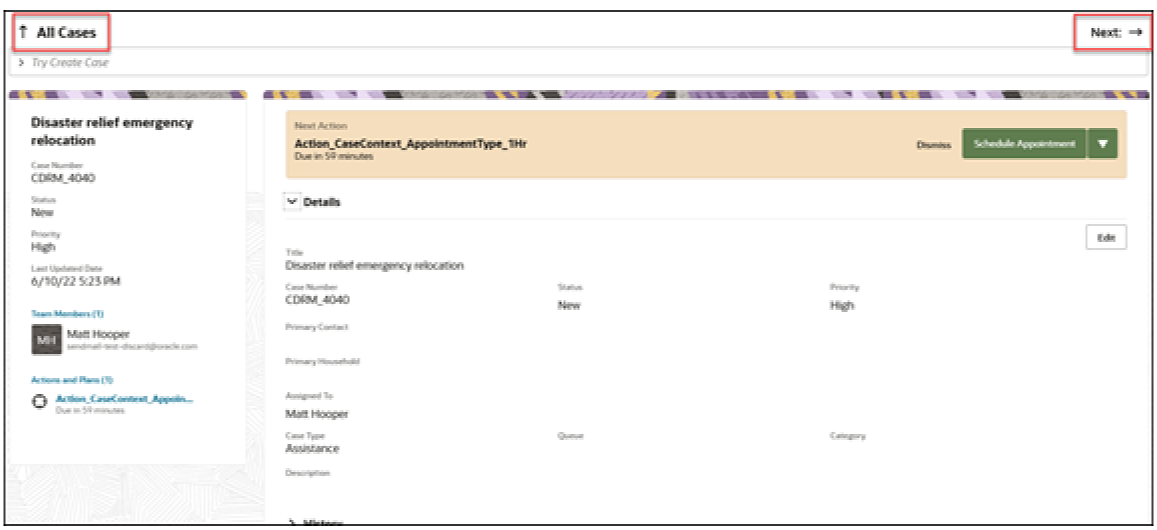
Navigate from One Record to the Next as You Work a List

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

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

Here's an example of a Case Details page. Click the title of the next record (highlighted in the screenshot) to go to the next record in the list.

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



Edit a Case

Here's how you can edit a case on the Case Details page:

You can use the **Action Bar** to edit a case, or click the **Edit** button in the Details folder to edit details in each folder.

Use the Action Bar

Either place your cursor in the **Action Bar** , or use the keyboard shortcut Alt+A for PC and Control+A for MacOr. Then start typing an action or search word, and the Action Bar displays suggestions that you can select from a list. To make suggestions, the Action Bar looks for key verbs and names of objects and fields.

- In the **Action Bar**, enter **add**, **create** , or **compose** to view a list of commands.

  Here's a list of available commands:

Action	Description
Add Action	Add individual action plan actions to the case.
Add Action Plan	Add action plans to the case.
Add Contact	Add contacts to the case.
Add Document	Attach files and URLs to the case.
Add Team Member	Add others to the case team.
Compose Message	Create a message for the case.
Create Appointment	Create an appointment for the case.
Create Case	Create another case.
Create Relationship	Create a relationship between cases or SRs.
Create Task	Create a task for the case.

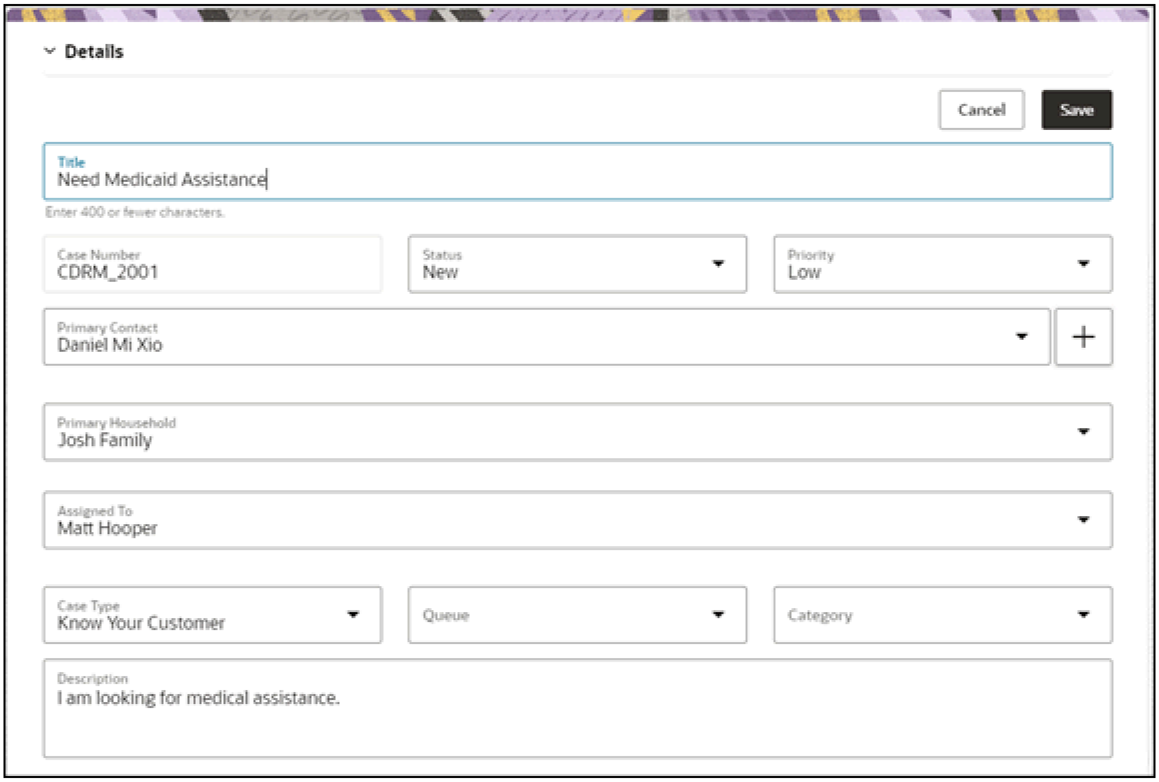
- You can also use the Action Bar to update individual fields in the case. Here's a list of the fields you can update:

Action	Description
Update Title	Modify the title of the case.
Update Status	Modify the status of the case.
Update Related Objects	Update the related objects for the case.
Update Queue	Queues the case for reassignment. Requires prior configuration of assignment rules.
Update Primary Contact Party Name	Modify the primary contact associated with the case.
Update Description	Modify the description of the case.
Update Category Name	Modify the category of the case.

Edit Details

1. To edit the case details from the **Details** region:

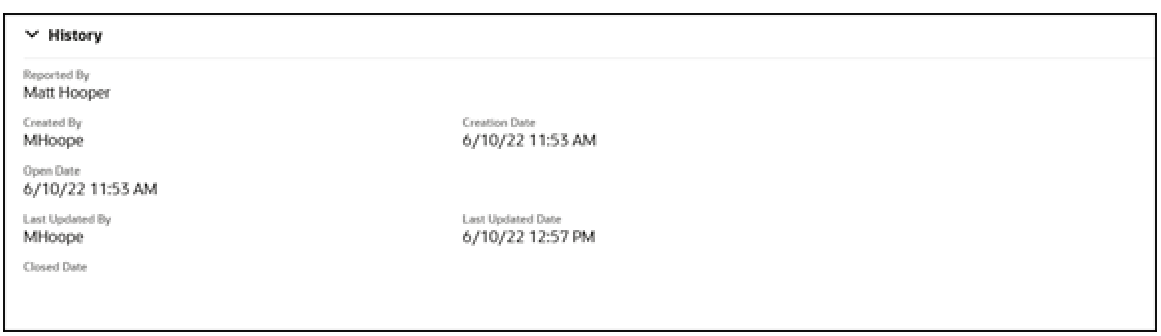
   a. Click **Edit**.
   b. Modify the editable fields in the form.



   c. Click **Save**.
   d. You can edit information or work with the folders under the details region by expanding each folder:

About Case History

Expand the History folder in the Case details page to review some of the historical information about the case.



The History folder displays the following information in a read-only format:

- Reported By
- Creation Date
- Created By
- Open Date
- Last Updated Date
- Last Updated By
- Closed Date

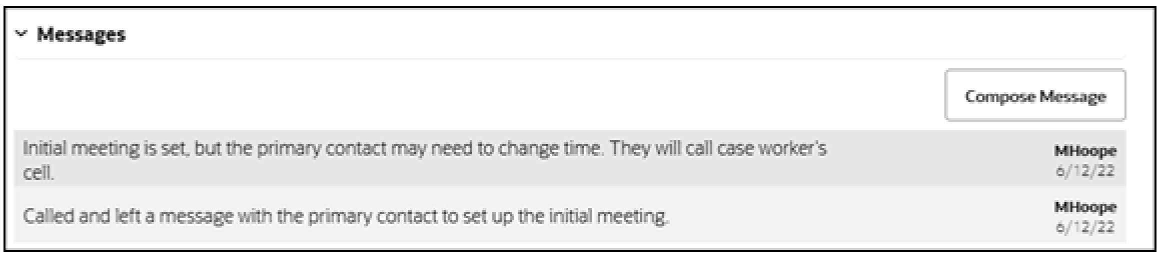
Compose Messages

Expand the Messages folder to view or compose messages for the case.

1. You can create internal messages about the case by typing the Compose Message command in the **Action Bar**, or expand the Messages folder and click **Compose Message**.

2. Type your message and click **Post**.

Messages are displayed in the Messages folder with the most recent message first.



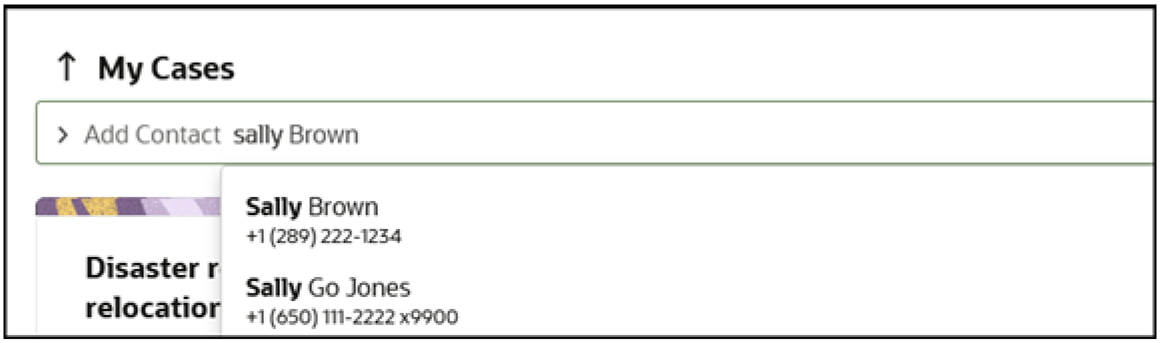
Manage Contacts

Expand the Contacts folder to view the contacts for the case.

Let's add Sally Brown to the case and make her the primary contact.

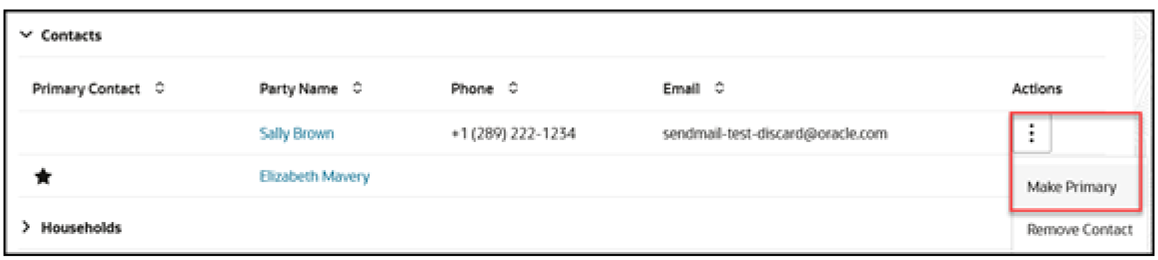
1. Type Add Contact in the **Action Bar**

   Keep typing the contact's name. the Action Bar will narrow down existing contacts in the drop-down list list. Select the contact you want to add to the case.



2. Make Sally the Primary Contact, but clicking the More icon (the icon with the three dots), and selecting **Make Primary**.

   You can click the contact name to view details of that contact.



The star icon has now changed to denote Sally as the new primary contact.

You can also remove a contact from the case by clicking selecting Remove Contact from the **More** icon.

Manage Households

Expand the Households folder to view the households for the case.

Let's add the Stone Household to the case and make them the primary household.

1. Click **Add Household**.
2. Select the additional household from the drop down list.
3. Click **Save**.
4. Make the Stone Household the Primary Household, by clicking the More icon (the icon with the three dots), and selecting **Make Primary**.

The star icon has now changed to denote the Stone Household as the new primary household.

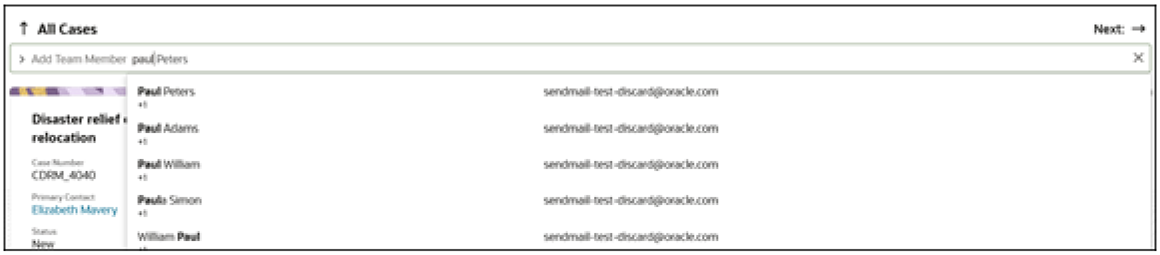
You can also remove a household from the case by clicking selecting Remove Household from the **More** icon.

Manage Teams

Expand the Teams folder to view the team members for the case.

Let's add Paul Peters to the team and and reassign the case to him.

1. Type Add Team Member in the **Action Bar**
   Keep typing the contact's name. the Action Bar will narrow down existing contacts in the drop down list. Select the contact you want to add to the case.



Manage Relationships

Expand the Relationships folder to manage the relationships this case may have with other cases or service requests.

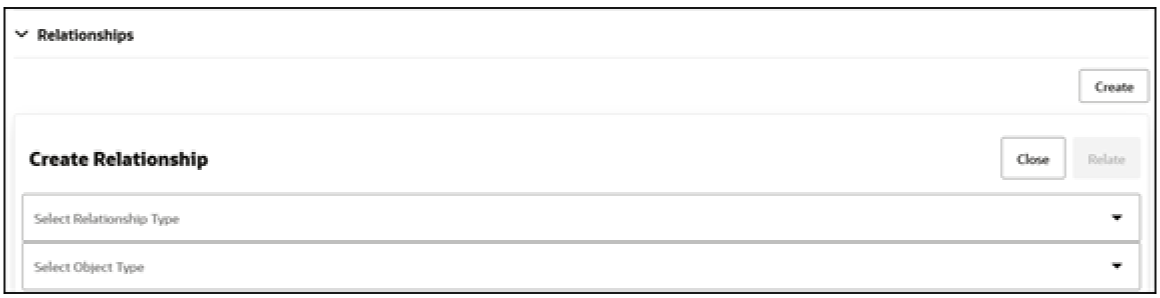
By relating a case with another case or service request, you can make updates faster and make notes across multiple objects. Here's a list of some of the different kinds of relationships that you can create between objects:

- Is Parent Of
- Is Child Of
- Is Related To
- Solves
- Is Solved By
- Supports
- Is Supported By
- Translates
- Is Translated By
- Blocks
- Is Blocked By
- Was Copied To
- Was Copied From
- Duplicates
- Escalates
- Is Escalated By

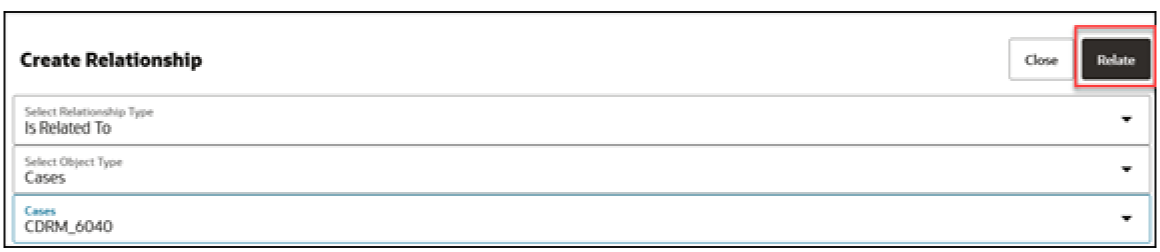
The two cases shown on the My Cases list page in the following image should be related to one another. Let's create a relationship between the two.

1. Click on one of the cases and expand the **Relationships** folder on the case details page.

2. Click **Create**. You can also type the command Create Relationship in the **Action Bar**.



3. Select the **Relationship Type** from the drop-down list. The types of relationships available are listed earlier in this topic.
4. Select the **Object Type** from the drop-down list. In this example, let's select Cases.
5. Select the other Case to relate from the drop-down list. You can enter the Case Number to find it faster.



6. Click **Relate**.

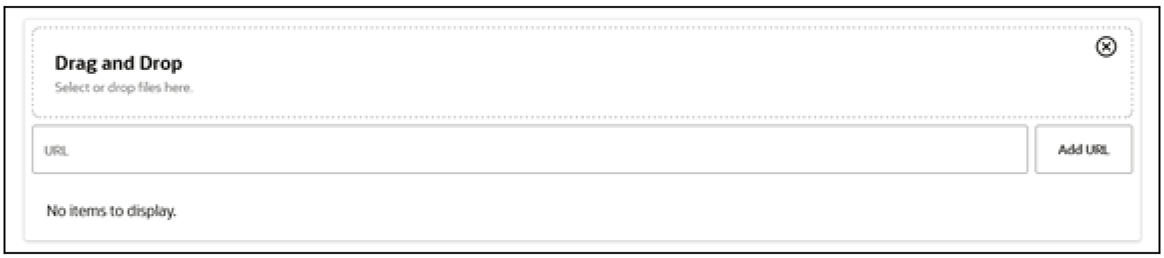
   The relationship is now created.

Add Documents

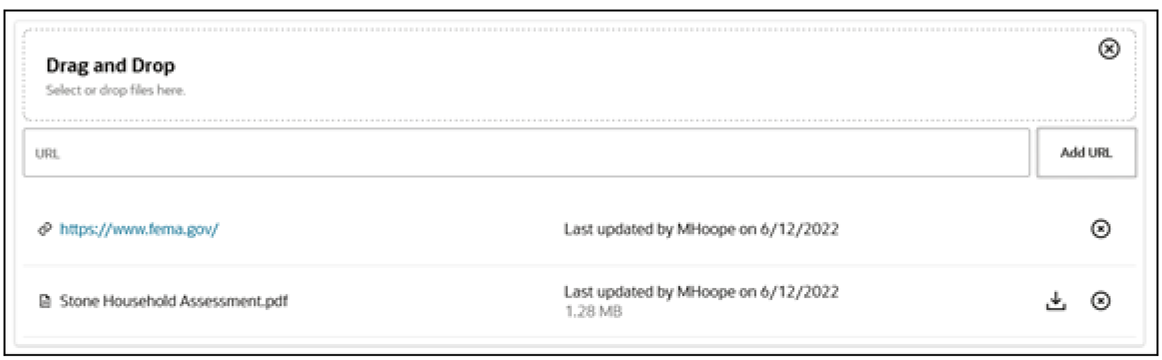
Expand the Documents folder to view documents that are added to the case. You can add documents to a case such as a PDF, PNG, or BMP.

Let's add a document and a URL to the case.

1. Type Add Document in the **Action Bar**



2. **Drag and Drop** a document into the folder or type in a **URL**.



You can delete documents by clicking the "x" icon on the row of the document you want to remove.

You can also download documents by clicking the download icon.

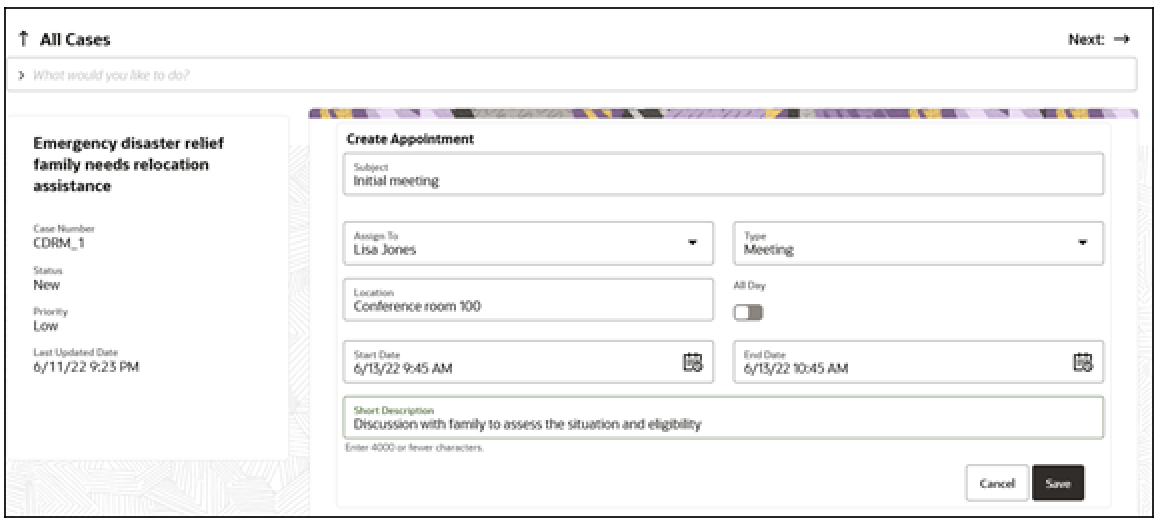
Create and Assign Tasks and Appointments

Here's how you create and assign tasks and appointments for cases.

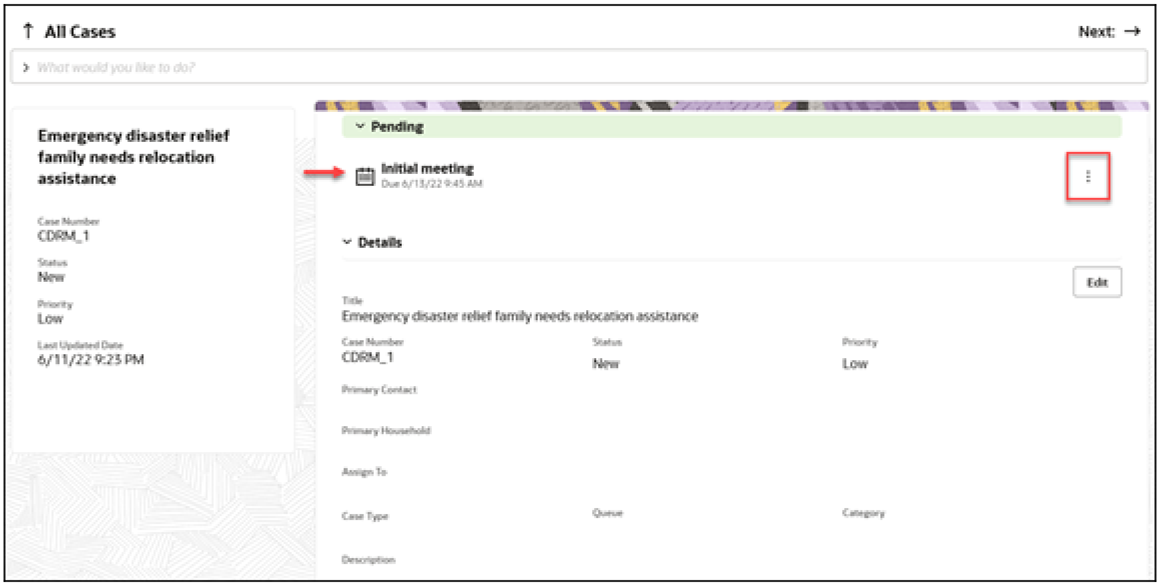
You can add tasks and appointments to a case and assign them to specific individuals. For this topic, let's create an Appointment.

Tip: If you're unsure of the command, you can type `/showall` to see a list of commands.

1. Type Create Appointment in the **Action Bar**.
2. Complete the necessary fields in the Create Appointment form.

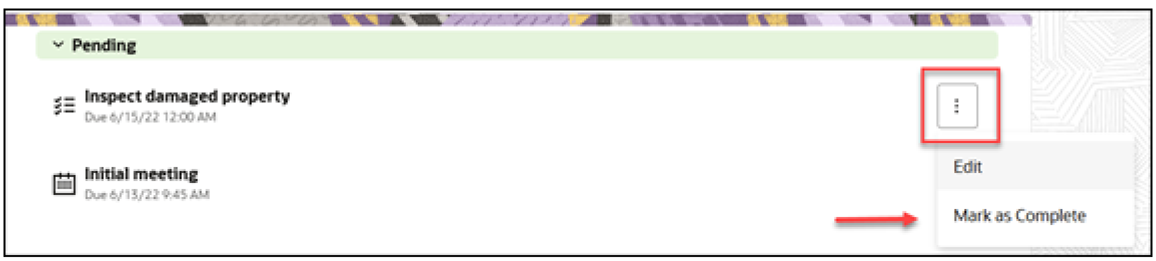


3. Click **Save**.



The Case detail page now shows the pending appointment at the start of the page. You can click **More** (icon with the three dots) to edit or reassign the appointment.

For tasks, click **More** (icon with the three dots) to edit or mark the task as complete.



4 Actions and Plans

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

An action plan action is an individual event that needs to be done to close a case.

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

Work with Actions and Plans

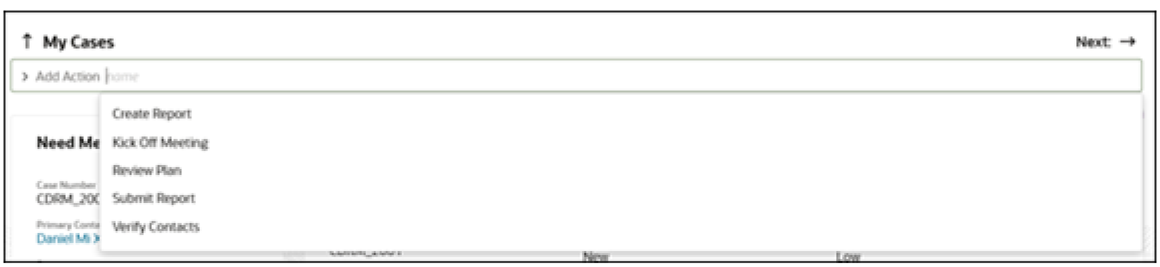
This topic shows you how to manage solo actions and plans for a case.

Add a Solo Action

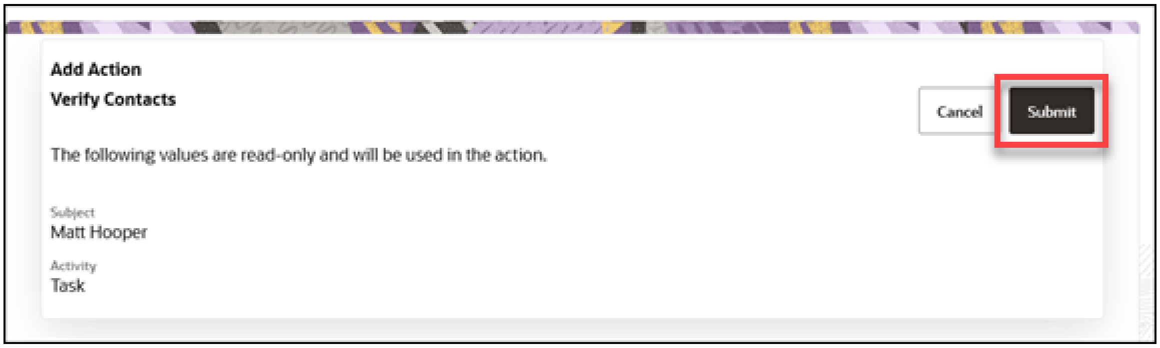
Here's how to add a solo action to a case:

1. Navigate to the details page for the case where you want to add an action.
2. In the Action Bar start typing Add Action.

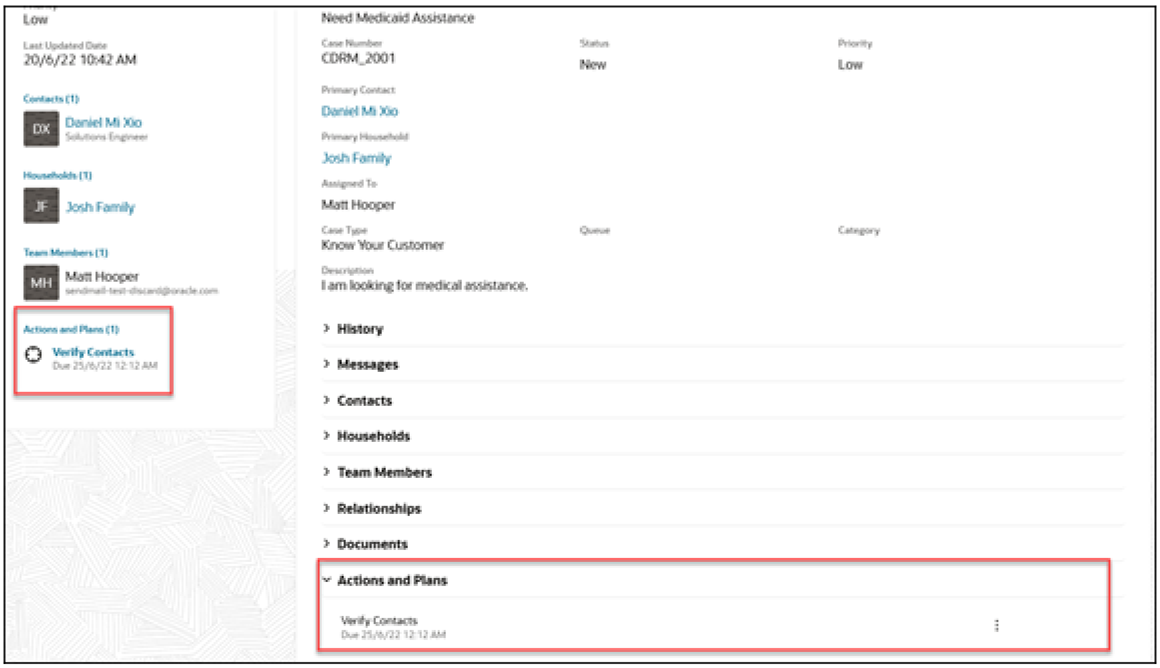
   Keep typing the name of the action if you know it. The Action Bar will start narrowing down results with existing actions in the drop down list. Select the action you want to add to the case.

3. Your selected Action is summarized, including values that can and cannot be changed. Change any editable attributes and click **Submit**.



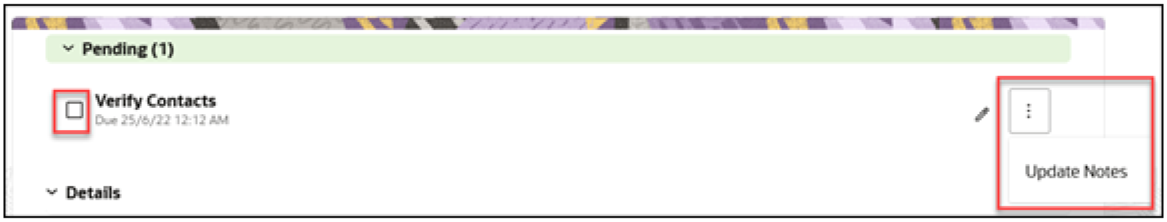
You can now see the action in the **Actions and Plans** folder, the **Case Summary** region, and in the **Pending** folder. Action plans can be as a list, or in a diagram view.



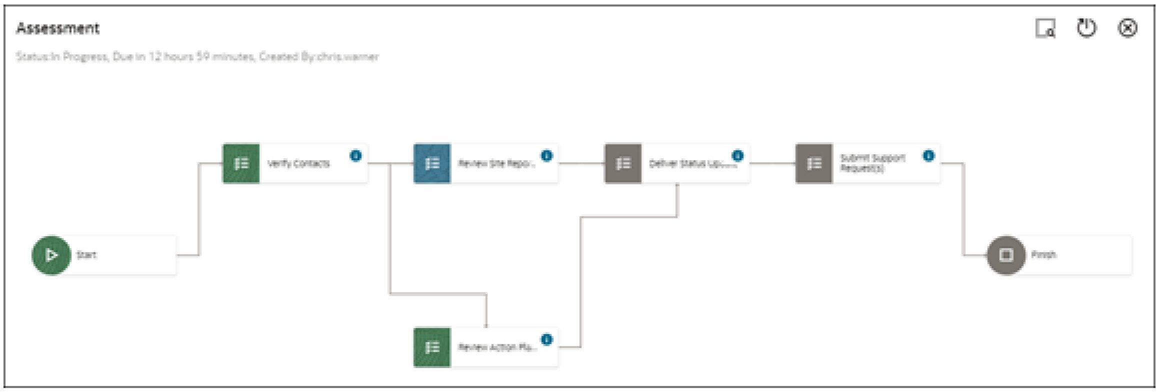
View Details or Edit an Action

You can view the details of an action by clicking the **Edit** icon for the action in the **Pending** folder, or scroll down and expand the **Actions and Plans** folder.

In the **Pending** region you can also update notes or mark the case complete. To update notes, click Update Notes under the **More** (vertical 3 dots) icon. Mark the action complete by clicking the checkbox next to the action.

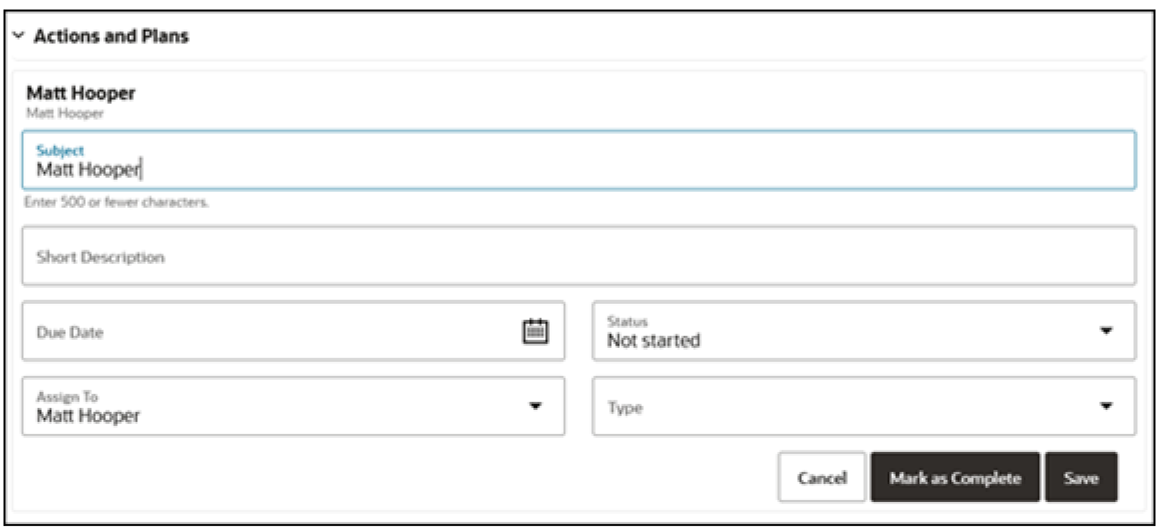


The **Actions and Plans** folder shows a high-level diagram where you can see, and interact with the plan from start to finish.



Hover over an action within the plan and click the horizontal 3 dots icon to view the action details or mark as complete.

The following image shows the action details for an action type Task. Other action types, such as Appointments and Service Requests, have different details displayed, and may open in a separate browser tab.



Add a Plan

Here's how you add a plan to a case:

1. Navigate to the details page for the case where you want to add a plan.

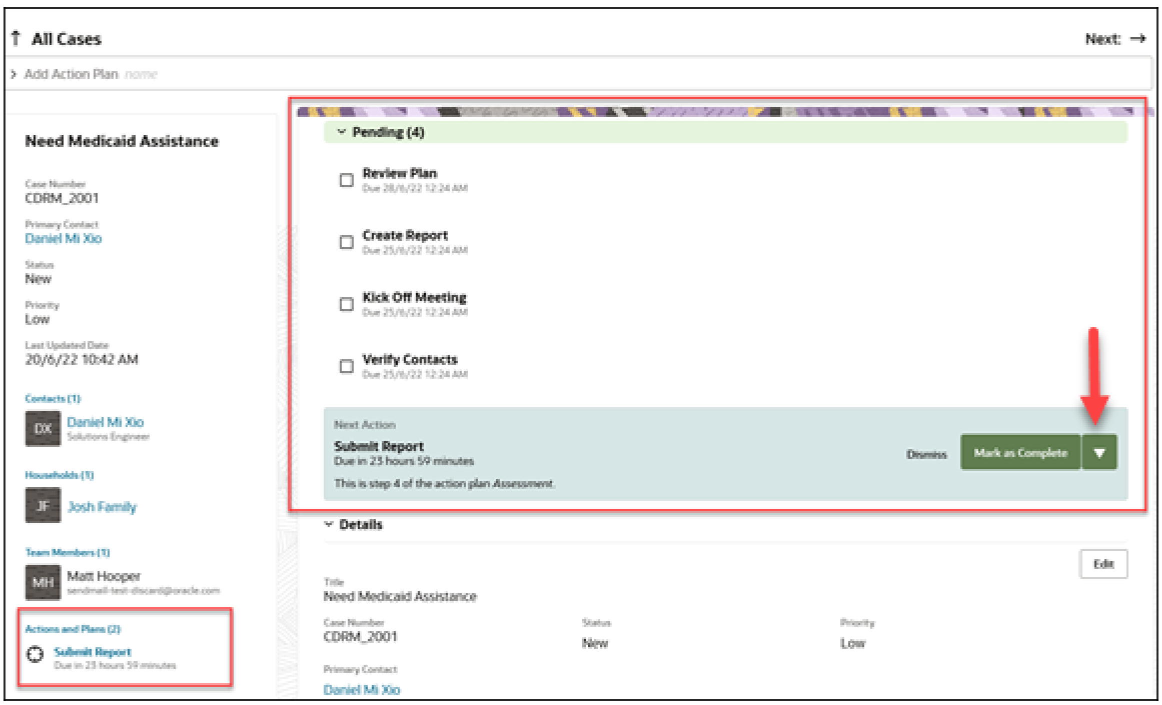
2. In the Action Bar start typing Add Plan.

> **Tip:** Instead of clicking inside the Action Bar, when you arrive on the page, try using the keyboard shortcut Alt+A for PC (or Control+A for Mac) to put focus on the Action Bar. Then just start typing Add Plan.

Keep typing the name of the plan if you know it. The Action Bar will start narrowing down results with existing plans in the drop down list. Select the plan you want to add to the case.

The plan is automatically added to the case.

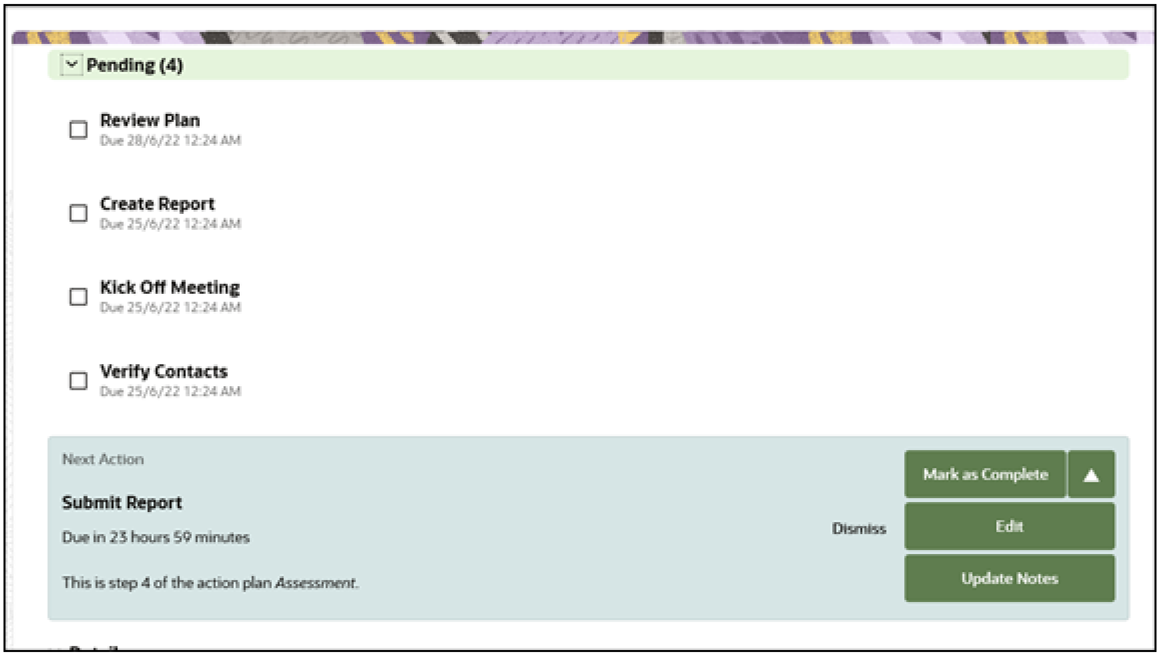
You can now see the plan in the **Actions and Plans** folder, the **Case Summary** region, and in the **Pending** folder.



Expand the Pending folder to see a list of individual actions for the plan.

The **Next Action** in the plan to be completed is highlighted. You can select Mark as Complete, Edit, or Update Notes.

You can also temporarily dismiss the highlighted action. If other other actions are pending, the next action will be highlighted.


Pending (4)
Review Plan
Due 28/6/22 12:24 AM
Create Report
Due 25/6/22 12:24 AM
Kick Off Meeting
Due 25/6/22 12:24 AM
Verify Contacts
Due 25/6/22 12:24 AM
Next Action
Submit Report
Due in 23 hours 59 minutes
This is step 4 of the action plan Assessment.
Dismiss
Mark as Complete
Edit
Update Notes